WinTOTAL "Athena" Generation

User Guide

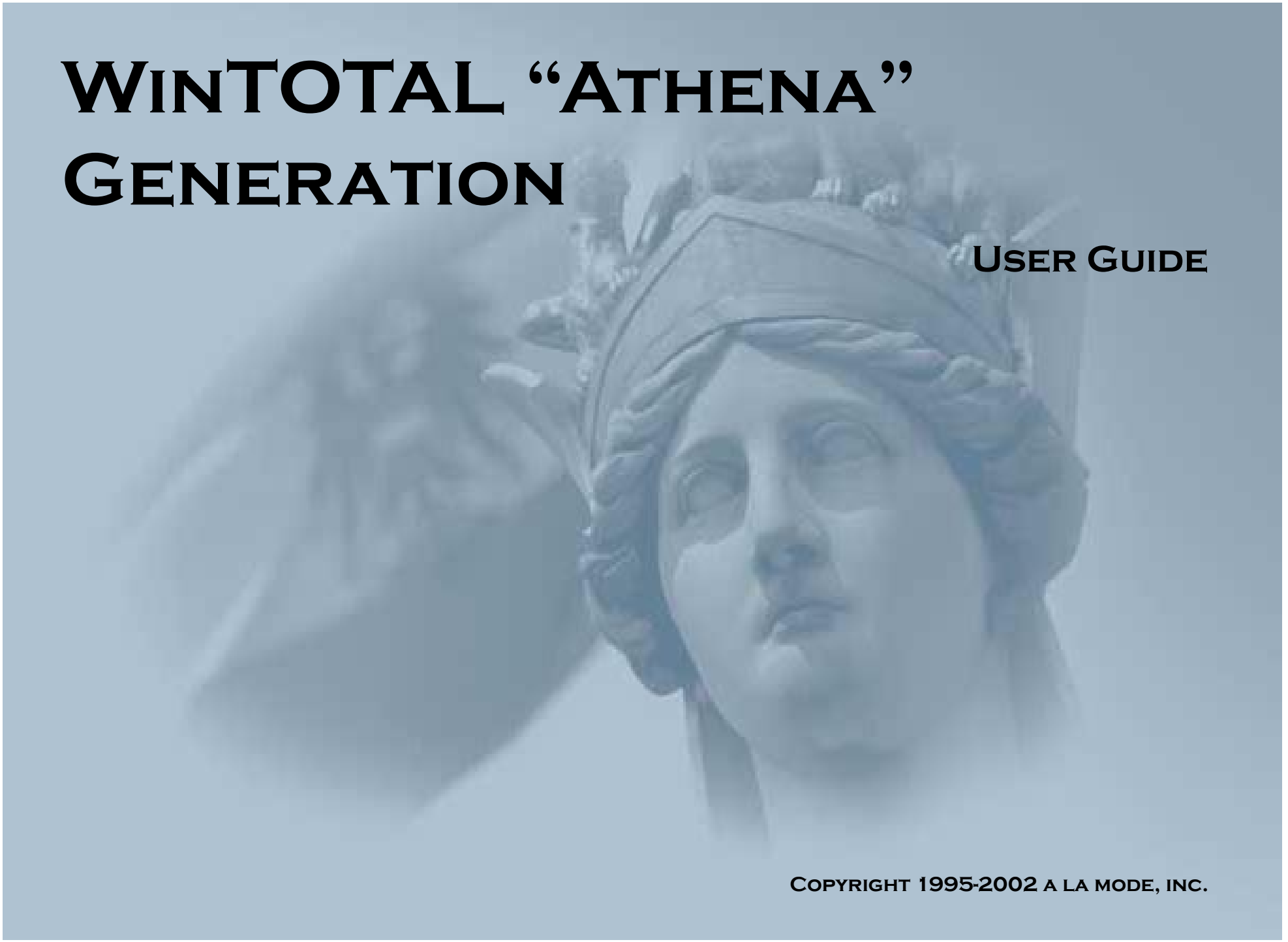

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Table of Contents

Instructions for Online Guide

About this guide. This online table of contents contains hyperlinks that take you to all the chapters in our Athena User Guide. Over 200 pages of valuable tutorials, tips, and tricks are accessible right here!

Viewing individual chapters. As you move your cursor over a chapter name, you'll see it "point". From there, click, and the corresponding document will be loaded on screen for viewing or printing. At the end of each document is a section titled "More Chapters". There, you will find a clickable link back to this table of contents.

Printing the user guide. Each of the following chapters may be printed individually once they are loaded. If you wish to print the entire user guide (or multiple chapters) at one time, we have provided a shortcut on your Athena CD. That shortcut loads a PDF that has all the chapters combined into one file - current at the time your CD was produced. Just insert your Athena CD, wait for the main screen to appear, and click the link for "Full User Manual".

Searching user guides. Once a chapter (or the full user manual from the CD) is loaded on screen, you can press CTRL+F and use Acrobat's "Find" feature to search for phrases in the document. The Athena User Guide is also indexed and searchable from within the WinTOTAL program by clicking "Help" and choosing "Contents".

1 - Welcome to Athena

2 - Form PowerView

3 - Contents PowerView

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5 - Comps PowerView

6 - Photos PowerView

7 - Apex and the Sketch PowerView

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Getting Started

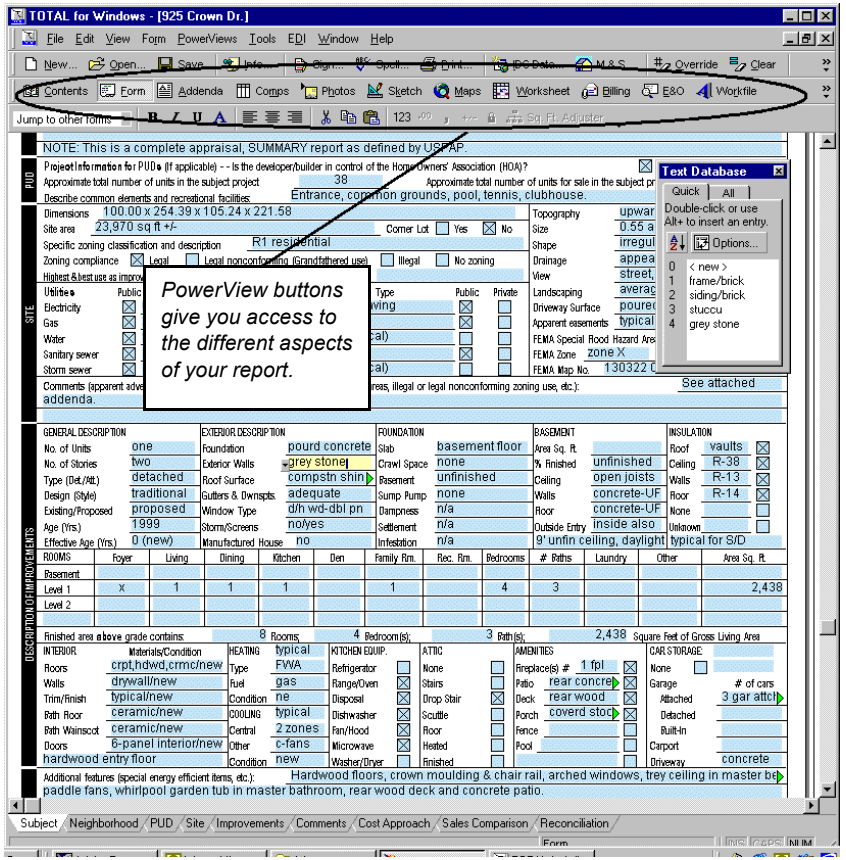
Welcome to Athena

Athena is the 4th generation of WinTOTAL - the software used for more appraisals than all others combined. This "Getting Started" chapter will give you an overview of Athena's features. Go through it sequentially before diving into the other chapters of this 200+ page manual.

Conventions in These Manuals

Before we get started with the program, let's cover a few of the conventions used to describe the instructions in this manual:

- **Click, double-click and right-click.** Most items are activated with a single click. If a double-click is needed, this manual will tell you. To "right-click", use the button on the right side of your mouse.
- **Menus.** Menus are near top of the WinTOTAL screen. They are labeled File, Edit, etc. The last one is the Help menu which gives you access to a searchable index of topics in this guide.
- **PowerView.** Functions are arranged in screens we call PowerViews. When a report is open, you'll notice buttons labeled Contents, Form, Addenda, etc. at the top of your screen. Click these once to switch to a different PowerView.
- **Select.** When the manual tells you to select something, it means to click once on it. A selected item will be highlighted.
- **Window/Dialog.** We'll use the terms "window" and "dialog" when referring to the presently active screen. There is also a Window menu with functions to manage multiple reports open at once.
- **Tabbed Dialog.** Some dialogs in WinTOTAL have clickable "tabs" along their top or bottom that take you to other screens and dialogs.
- **Drop-down lists.** Often, fields in a WinTOTAL dialog will have an arrow displayed on the right side of them. By clicking the arrow, you can access a picklist of items.
- **Hyperlinks and more chapters.** Throughout this chapter, you'll see other chapter names such as ***"Sending and Receiving Reports"***. If you are reading this guide on screen, you can click the text to access that chapter. Likewise, our main ***"Table of Contents"*** is linked at the end of every chapter as well as on the left of the on-screen manual.


TOTAL for Windows - [925 Crown Dr.]
File Edit View Form PowerViews Tools EDI Window Help
Contents Form Addenda Comps Photos Sketch Maps Worksheet Billing E&O Workfile
PowerView buttons give you access to the different aspects of your report.
Text Database
Subject Neighborhood PUD Site Improvements Comments Cost Approach Sales Comparison Reconciliation

Our PowerView concept arranges features and workflow in your reports. Instead of menus with commands buried in them, each PowerView puts the functions you need right on screen in an intuitive and obvious manner.

Getting Started

Starting WinTOTAL

Instructions we display on screen

By now, you have most likely started WinTOTAL at least once. At various times, WinTOTAL will need to perform various actions such as updating system files after a program update or you may be prompted with special instructions. It's important to read each screen as it is presented so that you can be informed and operate more efficiently.

As you work through many of WinTOTAL's features the first time, a tutorial will also pop-up and point out certain key elements regarding what you are about to do. We know you just want to dive in and start using the program, but time invested in training will pay off many times over.

Network considerations

In multi-user offices with a network server, you do not need to install WinTOTAL separately on the workstations' "C" drives. Just install once to the server, then browse to the server's drive and run WIN2000.EXE. **Be sure you have mapped a drive letter to the server's and that your Win2000 directory is in a sub-folder under that drive (i.e. your path would be F:\WIN2000\WIN2000.EXE)**

Before using WinTOTAL in a networked environment, we recommend reading our ***"Networking WinTOTAL"*** chapter.

Appraisal Desktop Overview

Essential activities in one interface

When starting WinTOTAL, you will typically see the Appraisal Desktop first. (If it doesn't start automatically, click Open.)Therefore, we will give a brief description of its features before diving into report creation in *"Beginning a New Report"* on page 6 of this chapter.

The Appraisal Desktop is a central location for file management, billing, office management, support solutions and even online resources. The different areas of the Appraisal Desktop are accessible by clicking their associated icon on the left side of the window.

Snapshot

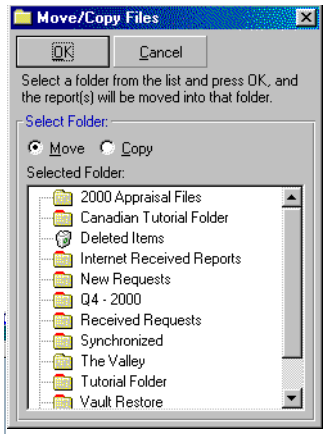
Want to see, at a glance, how many reports are ongoing and how much money you still have coming in from finished jobs? The Snapshot does

this as well as provide information on EDI activity and even an HTML based "news" section. As a matter of fact, the snapshot is completely HTML and gets a live feed from us so we can always keep you up to date.

File Cabinet: Gateway to your reports

The File Cabinet is where you go to access your files. It is similar to Windows Explorer in that you have folders on the left and files on the right. The purpose of the File Cabinet is to save you the trouble of manually managing files through Windows Explorer. Some functions you will find handy are:

- **Search.** This lets you search the File Cabinet for specific files based on the contents of the file. If you are searching for a property at *123 Main Street*, all you need to type in the property address field is the word *main*. The File Cabinet automatically places wildcards at the beginning and end of whatever you type. The searching is fast, because key information you enter in forms is automatically copied to the File Cabinet's database.
- **Move/Copy.** Easily copy or move the selected file(s) to another folder or disk. You can also drag and drop files into other folders.
- **Info.** This displays key information as well as billing data on the currently selected report in the WinTOTAL "Requester". Changes you make in the Requester automatically transfer into forms contained in the report.
- **Print.** Without opening a file, you can send it to your printer.
- **Send EDI.** WinTOTAL lets you send files electronically without opening a separate e-mail program. Just select a file, click Send EDI, fill in the delivery details and click Send/Receive. EDI is really easy with WinTOTAL, but be sure to see our dedicated chapter on the EDI center for details on setting up EDI and becoming an EDI expert.
- **QuickNotes.** At the bottom of the file list is a panel that shows information about the currently selected report. When you click the QuickNotes tab, you are given an area in which you can jot down miscellaneous notes about that job without having to open the entire report. You can use this if you field a phone call about a particular assignment or need to pass a note to an appraiser about a particular item in a report.



WinTOTAL's Move/Copy functions make it easy to transfer reports to a diskette or different folder. You can also drag and drop reports between folders and disks.

As you can tell, the File Cabinet is extremely powerful. After going through this chapter, see our dedicated "***"Managing Your Files"***" guide for details on other File Cabinet capabilities such as sorting, searching, printing and customizing.

EDI Center

EDI is synonymous with "e-Commerce." A key feature in WinTOTAL is the ease with which you can send files electronically. In the previous section, we briefly explained how to simply send a file. However, our EDI Center takes sending and receiving files via WinTOTAL to a new level by giving you one place where you can:

- Send and receive files in WinTOTAL's native format or a non-proprietary format like the Adobe PDF.
- Automatically process certain types of files as they are received.
- Send and receive plain e-mail messages without having to use a third party e-mail program.
- See a log of outbound mail in the Outbox folder or what has been sent in the Sent Items folder.

If you've used an e-mail program like Microsoft's Outlook®, then you'll be right at home in our EDI Center.

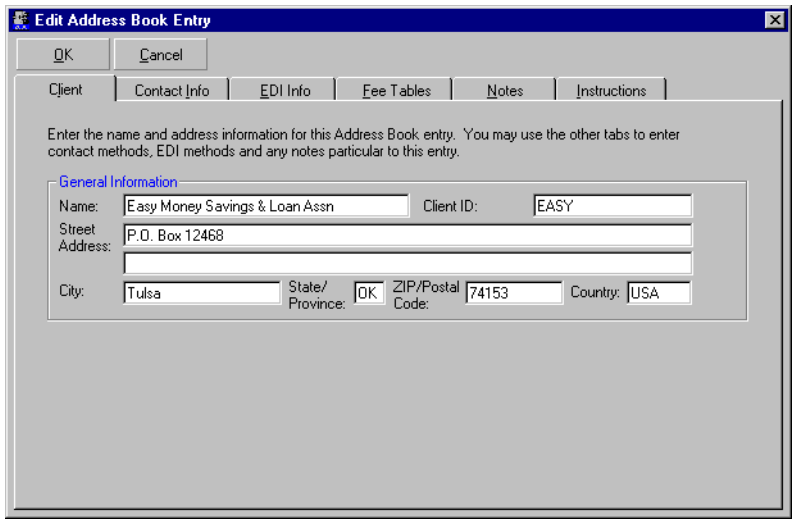
The first time you attempt to use our EDI functions, you will be prompted to configure your Internet settings, if you didn't do so during the installation. Be sure to read our ***"Sending and Receiving Reports"*** chapter for assistance with configuring and using the EDI Center.

Management

The Management area is centered around billing functions and running reports. WinTOTAL can automatically assign fees based on the job type and client as well as assign fee splits based on the appraiser. The ***"Payments and Order Tracking"*** chapter of this user guide is dedicated to these functions.

Contacts

WinTOTAL saves you from having to retype the names of your clients and appraisers for each report. The Contacts section of the Appraisal Desktop is where you manage your address book. Not only is the address book a way to eliminate repeated data entry, but it is also



Using the Address Book feature in WinTOTAL keeps you from having to re-enter contacts repeatedly as well as enables billing and tracking functions.

essential to all billing and report tracking functions. In other words, if a particular entity isn't listed in your Contacts, then you won't be able to run reports on them either!

- The drop-down menu labeled Category lets you filter the list based on the type of contact.
- To add a new contact, click Add New and fill out the fields in the Edit Address Book Entry window. For Appraiser entries, be sure to put in license and certification information. The ID field is a "code" for your internal reference. It helps you separate clients with the same name, but different contact information. The EDI Info tab is described in the ***"Sending and Receiving Reports"*** guide.
- The Edit Local Office option is where you enter information that transfers to your invoices. During the installation of WinTOTAL, you were prompted to fill out this screen as well. If you neglect the completion of this item, invoices generated through WinTOTAL won't have your name on them!

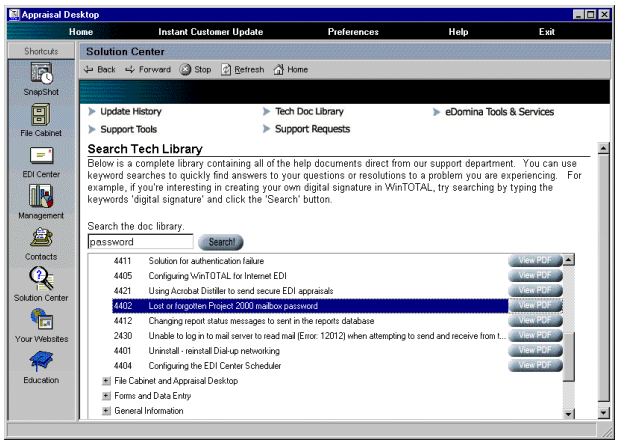
As we'll see in *"Adding contacts on the fly"* on page 9, you can add entries to your address book in the midst of filling out an appraisal request. Therefore, if someone wasn't in your contact list, you can add them without cancelling out of the request.

Solutions Center

The Solution Center is your key to getting help with WinTOTAL and remaining productive. Not only does it have tools that help our technicians resolve issues, it is your gateway to self help. Loaded with our technical documents and live information from our support center, it's a dynamic part of your Appraisal Desktop.

Your Websites and Education

The Appraisal Desktop also incorporates extra sections that pull information from the Internet. As the needs of our industry change, we can update these links and bring the information straight to you - eliminating the need for you to do extensive research on your own.


Appraisal Desktop
Home
Instant Customer Update
Preferences
Help
Exit
Shortcuts
SnapShot
File Cabinet
EDI Center
Management
Contacts
Solution Center
Your Websites
Education
Solution Center
Back
Forward
Stop
Refresh
Home
Update History
Tech Doc Library
eDomina Tools & Services
Support Tools
Support Requests
Search Tech Library
Below is a complete library containing all of the help documents direct from our support department. You can use keyword searches to quickly find answers to your questions or resolutions to a problem you are experiencing. For example, if you're interesting in creating your own digital signature in WinTOTAL, try searching by typing the keywords 'digital signature' and click the 'Search' button.
Search the doc library.
password
Search!
4411 Solution for authentication failure
4405 Configuring WinTOTAL for Internet EDI
4421 Using Acrobat Distiller to send secure EDI appraisals
4402 Lost or forgotten Project 2000 mailbox password
4412 Changing report status messages to sent in the reports database
2430 Unable to log in to mail server to read mail (Error: 12012) when attempting to send and receive from t...
4401 Uninstall - reinstall Dial-up networking
4404 Configuring the EDI Center Scheduler
View PDF
File Cabinet and Appraisal Desktop
Forms and Data Entry
General Information

The Solutions Center has a "self-server" tech doc library. And, don't forget to click Instant Customer Update to get current additions to your WinTOTAL program!

Getting Started

Beginning a New Report

The report concept

WinTOTAL uses a "report" concept for your appraisals. All information for an appraisal - form data, photos, map, sketch, notes, and addenda - is encapsulated in one file. WinTOTAL even applies its own compression on the file to maximize disk usage and speed electronic transmission.

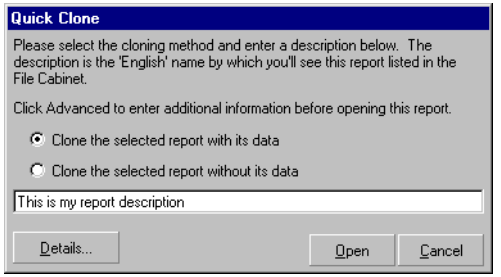
The rest of this guide will take you through the process of completing an appraisal report using WinTOTAL. In several places, we'll refer you to other chapters to learn more about particular features. For now, let's cover the basics.

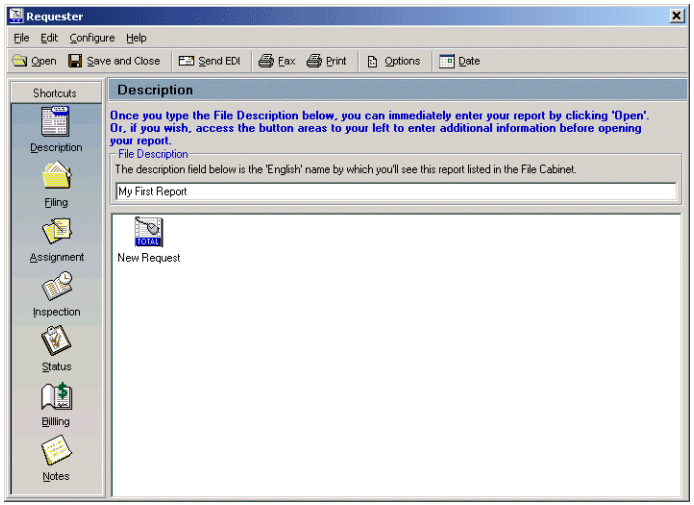
Starting a report from scratch

Even though most people use WinTOTAL's cloning feature to base a new file from an existing report or use a template, it's important to know how to build a report from scratch so you can work up to a library of template reports.

1. Start in the File Cabinet area of the Appraisal Desktop.
2. Click the folder in which you wish to create the report. For this exercise, go to the Tutorial folder.
3. Click New. This brings up our Requester utility. This is an order entry module. You get to the various sections of the order/request by clicking the shortcuts along the left side.
4. Enter a description for this report. Many appraisers use the address, but you can use anything you like. If you leave this item blank, WinTOTAL will default it to the address you enter in the Assignment section. For this exercise, call it "Training Template".
5. WinTOTAL doesn't require you to enter anything else into the Requester. It is recommended that you use the Address Book for entries in the Assignment section. We'll get to that later in this section. Right now, we are interested in showing you how to get the basic forms in a new file, so click the Open button at the top of the Requester window.

The Requester "Quick Clone" lets you jump start reports without going through the Requester. However, we're going to use the full Requester screen (shown below) for this tutorial.


Quick Clone
Please select the cloning method and enter a description below. The description is the 'English' name by which you'll see this report listed in the File Cabinet.
Click Advanced to enter additional information before opening this report.
Clone the selected report with its data
Clone the selected report without its data
This is my report description
Details...
Open
Cancel

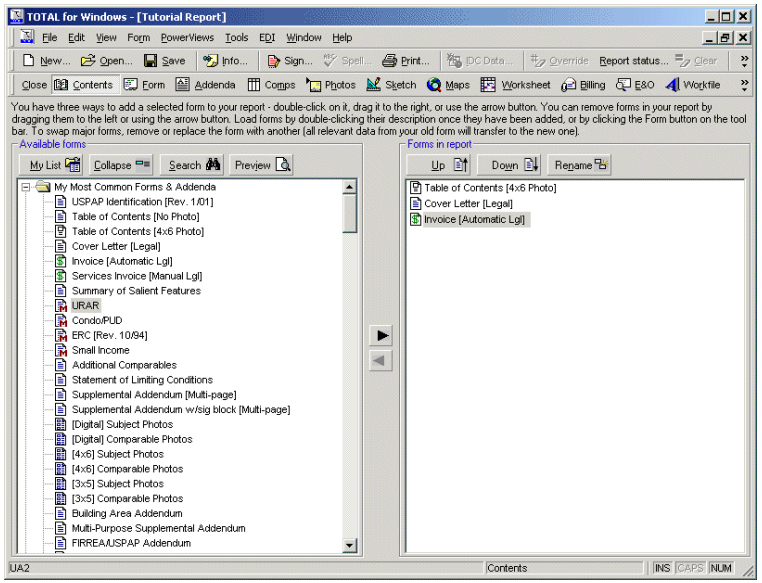

Requester
File Edit Configure Help
Open Save and Close Send EDI Fax Print Options Date
Shortcuts
Description
Filing
Assignment
Inspection
Status
Billing
Notes
Description
Once you type the File Description below, you can immediately enter your report by clicking 'Open'. Or, if you wish, access the button areas to your left to enter additional information before opening your report.
File Description
The description field below is the 'English' name by which you'll see this report listed in the File Cabinet.
My First Report
New Request

Your report description can be up to 200 characters long and doesn't necessarily need to be your report address. WinTOTAL can even be set to name your file, EDI attachment or EDI subject line based off the description you enter here.

6. Since this is a new request with no forms, WinTOTAL will first want you to choose the forms. The forms list is split into different folders, based on the type of form.
   - Most of the forms we're going to use are in the “Most Common Forms and Addenda” section of the forms list.
   - You can “expand” and “collapse” a folder to hide or display its forms in the scrolling list by clicking the “+” sign that appears to the left side of the folder icon. Instead of scrolling up and down through the list and expanding / collapsing the sections, you can also find forms using the search function.
   - To add a form, highlight the form and click on the Add button (the right-pointing arrow in the middle of the screen.) You can also double click on the form from the list on the left.
   - Major forms - such as the URAR or Small Income form - which define the type of report as well as “feed” addenda and supporting (or minor) forms, have an “M” in the icon next to them. You are allowed one major form per report.
7. For now, lets go ahead and add some basic forms such as a Table of Contents, any “major” form, Statement of Limiting Conditions, Subject Photos and Comp Photos.
8. Once forms are in your report, you can rearrange them by clicking them once in the list on the right and then using the Up/Down buttons. You can also drag and drop the forms to put them in the right sequence.

   We stress putting the forms in the right sequence because this is the order in which they will print. It also makes better use of our Table of Contents form and automatic page numbering, which give your report a more professional appearance as well as provide a record of what is in the report so no important addenda are “lost.”
9. If you want to type information into the forms, double-click the form as listed on the right side and you will be taken to it. *For now, we want to work with report basics.* So, click the **File** menu and select Close.

   *The entire **“Contents PowerView”**chapter is dedicated to a tutorial on the best way to build reports. We recommend going through it at a later time to become more proficient in this area of WinTOTAL.*


TOTAL for Windows - [Tutorial Report]
File Edit View Form PowerViews Tools EDI Window Help
New... Open... Save Info... Sign... Spell... Print... DC Data... Override Report status... Clear
Close Contents Form Addenda Comps Photos Sketch Maps Worksheet Billing E&O Workfile
You have three ways to add a selected form to your report - double-click on it, drag it to the right, or use the arrow button. You can remove forms in your report by dragging them to the left or using the arrow button. Load forms by double-clicking their description once they have been added, or by clicking the Form button on the tool bar. To swap major forms, remove or replace the form with another (all relevant data from your old form will transfer to the new one).
Available forms
My List Collapse Search Preview
My Most Common Forms & Addenda
USPAP Identification [Rev. 1/01]
Table of Contents [No Photo]
Table of Contents [4x6 Photo]
Cover Letter [Legal]
Invoice [Automatic Lgl]
Services Invoice [Manual Lgl]
Summary of Salient Features
URAR
Condo/PUD
ERC [Rev. 10/94]
Small Income
Additional Comparables
Statement of Limiting Conditions
Supplemental Addendum [Multi-page]
Supplemental Addendum w/sig block [Multi-page]
[Digital] Subject Photos
[Digital] Comparable Photos
[4x6] Subject Photos
[4x6] Comparable Photos
[3x5] Subject Photos
[3x5] Comparable Photos
Building Area Addendum
Multi-Purpose Supplemental Addendum
FIRREA/USPAP Addendum
Forms in report
Up Down Rename
Table of Contents [4x6 Photo]
Cover Letter [Legal]
Invoice [Automatic Lgl]
UA2
Contents
INS CAPS NUM

Starting new reports from scratch means you must add all the forms into them. Using our cloning feature saves you this step.

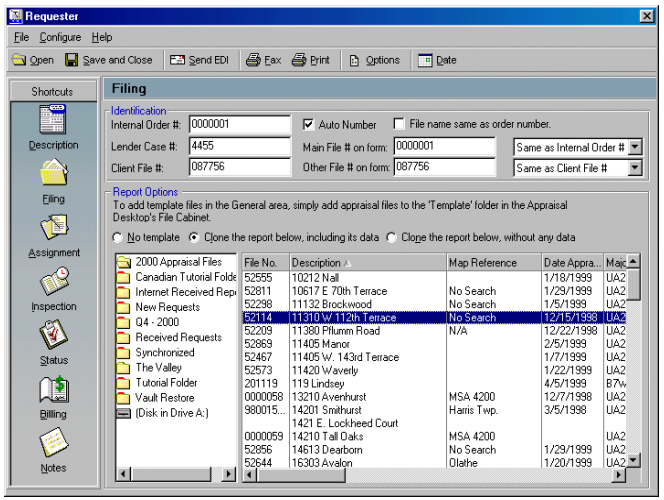
10. If prompted, enter the status of the report. This information is key to management reports and the dates here are crucial to billing. While they are self-explanatory, our ***"Payments and Order Tracking"*** chapter describes in detail the best way to use these items. After entering any necessary status information, click Save and Close.
11. Then, click Open to bring up the Appraisal Desktop again. In the File Cabinet, you should see the description of the report we just created.

What we have just accomplished is creating a basic report from scratch. You could start all your reports this way, but it may become tedious. The most common practice is to create templates (aka boilerplates or skeletons) and then use the Cloning feature, described next, to get a head start on new files.

Cloning - using one report as the basis for another

WinTOTAL has been designed to match the workflow of almost any appraisal practice. Cloning lets you use an existing file for the basis of a new one - forms and data. It is the most common way files are started.

1. Start in the File Cabinet area of the Appraisal Desktop.
2. Find the file you wish to clone in the Appraisal Desktop's File Cabinet. You can do this by browsing or using the Search feature. If you are brand new to WinTOTAL, go to the Tutorial Folder and click once on the sample template. Once you've found the file, click it once so that it is highlighted.
3. Click Clone. You'll get the Quick Clone dialog that is designed to streamline report creation. Your system can be configured to either bring this dialog up or the report details.
4. First, type a report description. This can be anything to help you identify the assignment.
5. Then, choose the clone method.
   - **Clone... with data.** This copies the entire report and data into the new file - clearing items like your signature, borrower, occupant and other items that don't need to be copied.
   - **Clone... without data.** This uses the forms structure of the cloned report, but clears all information from the Requester and forms.



Use the "Clone" feature in the Requester to avoid having to re-enter repeat information or when you are using "skeleton" templates.

6. At this point, click the Details button (as opposed to Open) since we want to demonstrate the Requester and the advantages to using it.
7. This brings up our Requester, which is an order entry module for WinTOTAL. Everything typed into the Requester is automatically transferred into your forms. Likewise, anything you type into a form goes back to the Requester. It's bi-directional.
8. Click the Filing shortcut on the left side of the screen. This is where you enter tracking numbers for the file. Instead of clicking in each field, you may use the TAB key get from item to item.
   - Note that you have options to have WinTOTAL generate an automatic sequential file number.
   - Next to the fields labeled "Main File # on form" and "Other File # on Form", there are drop down boxes that allows you to automatically use items already entered.
   - One of the printing features in WinTOTAL enables you to put page numbers on every form. Along with that page number will be the "Main File # on form" item. This is a great way to get a tracking number on forms where there isn't a field explicitly for it.

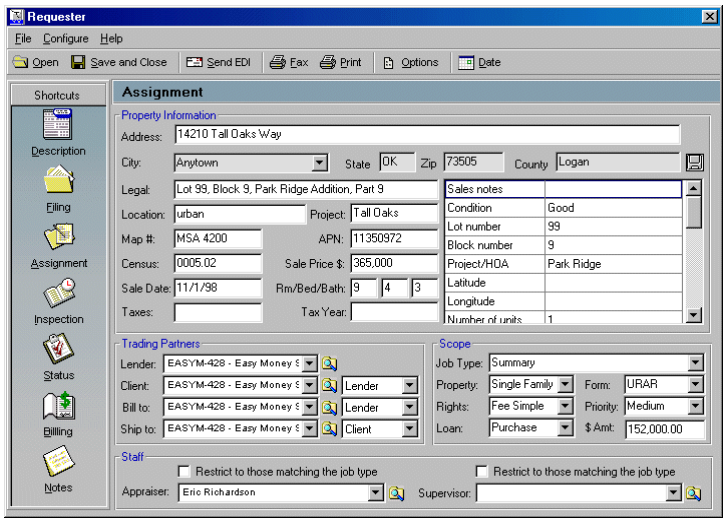
   9. Click the **Assignment** shortcut. This is where you type information specific to this job. This data transfers into the forms into the report.
10. Once you've entered a city, state, zip and county, you can click the diskette icon next to the county field to save that group of entries, accessible via the drop-down list in the city field, for future assignments.

Adding contacts on the fly

As we saw previously, we can add entities through the Appraisal Desktop's Contacts area. We can also add contacts into our address book in the middle of filling out a request. Click on the folder icon located next to fields like appraiser, lender, client, etc. There, you will be able to locate existing entries, edit an entry or enter a new one.

Finishing the request

Lets finish out the request and open up the report. In many fields, note that CTRL+D will add the current date and CTRL+T adds the current time.



Filling in all of the information in the Assignment section of the requester will save you possibly overlooking important information in your report.

1. Click the **Inspection** shortcut and fill in the applicable fields. The Occupant, Borrower and Agent fields have drop-downs that enable you to easily copy entries from one item to another. If you have Microsoft Office, you can even export the inspection date/time to Microsoft Outlook and have it remind you of your appointment.
2. Click on the **Notes** shortcut and enter any other pertinent information that will be necessary when completing the report.
3. Go to the **Billing** section and enter a figure in the Base Fee section. We'll talk more about this in the ***"Payments and Order Tracking"*** chapter.
4. Click **Open** and you'll then be able to edit the report. WinTOTAL opens the file at the place where you last left off. Notice that items typed into the requester are automatically transferred to the form.

The Form PowerView

Adjusting the screen view

Depending on the capabilities of your video card and monitor, you may not be able to see the whole form on screen. By default, the form covers the entire width of the screen. Here are ways to see the form clearer:

- Make sure WinTOTAL is maximized by clicking the maximize button in the top right hand corner of the application window. (It's the middle button.)
- Increase your video display resolution through Windows Control Panel. Details are available by calling 1-800-211-4513 and following the voice prompts to request fax document #4302.
- Click the **View** menu and choose a setting of 125% or greater. As you enter text in the fields, WinTOTAL will scroll for you.
- Toggle the QuickLists on and off by pressing F9. Or float it above your form by clicking the handle at the top of that panel and dragging.

Data entry basics

When entering data, note the following:

- WinTOTAL automatically wraps text in comment blocks, so you shouldn't press ENTER at the end of a line.

WinTOTAL remembers the last ten items you typed into a field and gives you a drop down list when in the field.

The maximize button will be at the top right hand corner of your WinTOTAL screen. If WinTOTAL isn't covering your entire screen, click it and it will.

- WinTOTAL will never let you type more into a field than will print. A green arrow next to a field means the text couldn't be displayed due to differences in video and printer resolutions, but will print. A red arrow means there is more text entered than will fit.
- Checkboxes may be toggled on/off by pressing the SPACE BAR or just by clicking in the field.
- SHIFT+ENTER will back you up one field.
- TAB emulates a typewriter by moving 'right' one field.
- Pressing F10 while in a field displays an easy to use interface that lets you customize the cursor movement in the form. Try it!

Changing the default font for all data

The default font for WinTOTAL data is Arial 9pt. If you wish to make this something different for all data in all reports, do the following:

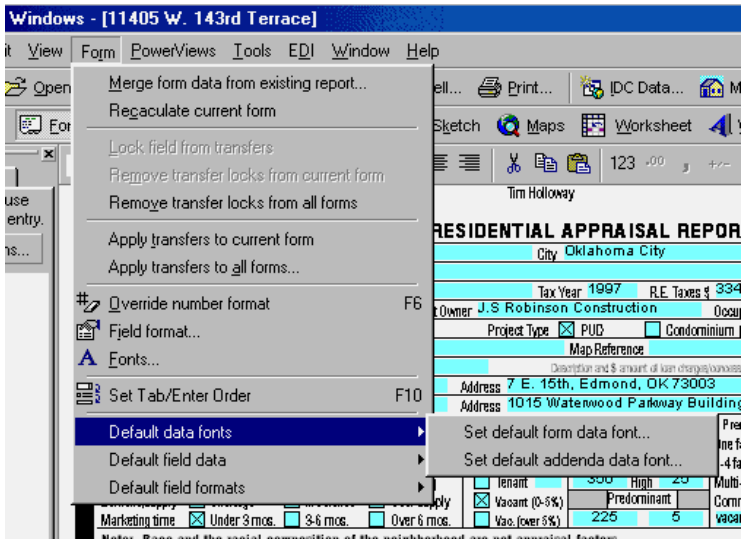
1. Click the **Form** menu and select Default Data Fonts.
2. Then, choose Set default form data font.
3. Choose the font and style from the standard Windows font dialog. Due to limitations in the design of the forms, font size is typically limited to under 11 points.
4. Click OK.

WinTOTAL will then update your current report. Note that all existing reports will print and display with this new font as well.

Field formatting and numeric fields

In WinTOTAL forms, the fields are pre-formatted according to how the most likely appraiser would prefer. The formatting is also customizable.

- As you move through the form, notice the buttons in the formatting bar will appear pressed, or up, depending on the formatting in the current field. For example, if you move to a numeric field such as the "RE Taxes" item, you'll see the numeric options appear pressed.
- While in a field, you can apply/remove justification and formatting by clicking the buttons on the formatting bar.
- If you need to enter text in a numeric field, type the text, and click the "123" button in the formatting bar.



Use WinTOTAL's Default data font function to change the text appearance for all forms in all reports. This is a lot easier than selecting all the text!

- A field that is numbers only can have that setting overridden by pressing F6 before ENTER to leave the field.

Permanent field formatting

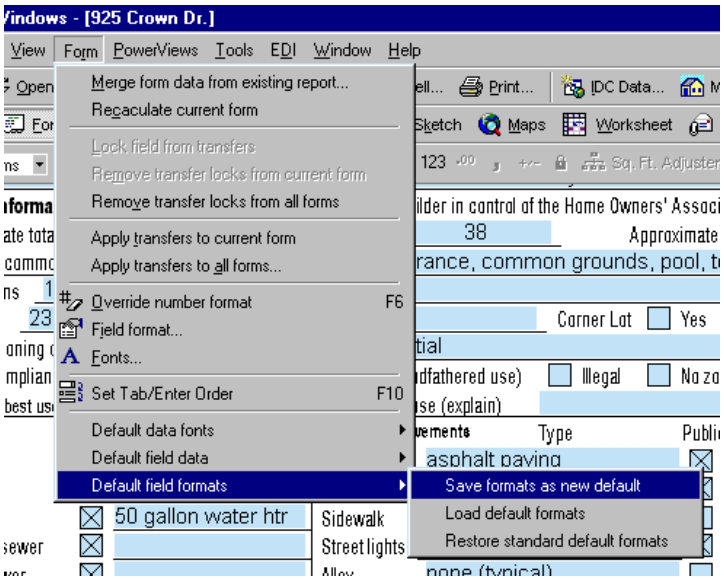
Format options changed using the formatting bar may be saved as the default for all new data files by doing the following:

1. Go to each field you wish to customize and apply the necessary formatting by clicking on the formatting buttons.
2. Click the **Form** menu item and choose **Default Field Formats**.
3. From the fly-out menu, click **Save Formats as New Default**.
4. You will be prompted with a confirmation. Confirm by clicking OK.

Accessing other forms

While in the Form PowerView, you can easily jump to other forms. Let's go to the Cover Page:

1. Click the **Jump to Other Forms** button.
2. Now, click on one of the supporting forms in the report.
3. As the page loads, notice information has transferred to it.
4. Jump back to the main form by clicking on the **Jump to Other Forms** button and then selecting it.



Instead of continuously overriding formats, save formatting changes for your forms.

Text Databasing (Standard Comments)

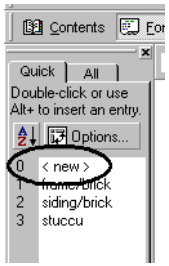
The Text Database is your library of standard comments. It gives you one click access to your most commonly used entries. It may be used to complete singular fields, whole sections, or even an entire form. This is the recommended way to have reusable text in your forms.

Creating single field comments

Comments are created by first typing the information on the form and then saving the text.

1. Go to the Functional Utility field, and type the word "average".
2. Double-click a vacant QuickList entry in the QuickList panel.
3. You'll see the keyname for this new comment. You can change it if you like. This is just the keyname, not the actual comment itself.
4. Click OK.

After typing text into a field, double click item 0 in your QuickList to add the text from that field into your hot keys - available by pressing ALT+the number you assign it whenever you are in that field in any future report.



Now, you should see AVERAGE appear in your quick list for that field. One bonus Text Databasing offers in comp grids is that it also added AVERAGE to the Quick Lists for every comparable.

Multi-field comments for entire sections

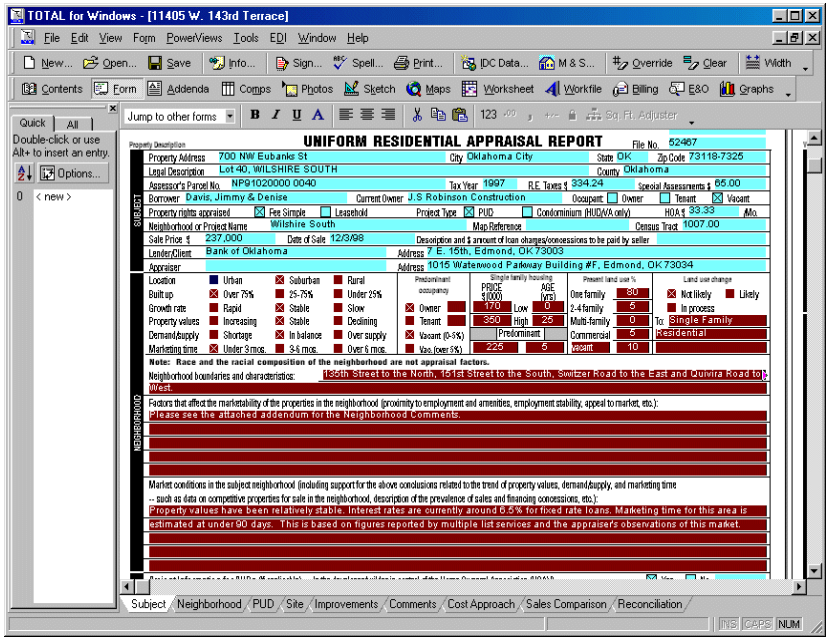
1. Enter the information you want for a comment in a group of contiguous fields. A good example is the Neighborhood section of the URAR.
2. Click in the last field of the section, the comment block for market conditions.
3. Hold down the SHIFT key and click in the first field in the block, the checkbox for "location."
4. Now, all of the fields should be highlighted. You can stop pressing the SHIFT key. (This same result may be obtained by clicking and dragging your cursor through all the fields you want to save.)
5. Click on one of the blank entries in the QuickList panel.
6. Enter in a more appropriate keyname, such as the name of the neighborhood, and click OK.

Now, when you move into the first checkbox of the neighborhood section, you'll see the name of the neighborhood appear in your QuickList

Text Database wrap-up

As you move from field to field, the list of comments at the bottom of the Form PowerView changes to reflect entries tied to a particular field.

- Quick Lists are available for every field of every form. They are listed in the QuickList panel which, by default, is on the left hand side of your form. (You can also drag it anywhere on screen, have it snap to the right side or appear floating above the form.)
- Your top nine responses are assigned a hot key, ALT+1 to ALT+9. You may use these hot keys, or you can double-click the individual comments to apply them.
- By moving your mouse over the All Comments item in the Form PowerView, you'll see a list representing all QuickLists for all fields plus comments that may not be tied to a particular field. This makes it easy to use comments in the addenda writer or in a form different from the one where the comment was created.



When multiple fields are highlighted, adding a text database entry inserts a QuickList for the first field in the block. When you use the QuickList item, it fills multiple fields.

- The Text Database may be configured to replace, append to or insert before existing text in the field. Click Tools, then Configure and then Formfilling for that option.

You can learn more about Text Databasing in the Mastering the Form PowerView guide.

WinTOTAL remembers your commonly used responses

In addition to Text Databasing and QuickLists, WinTOTAL also remembers the last ten items you typed into a particular field. Note this is a much less powerful feature than the actual QuickLists, but it is handy and automatic.

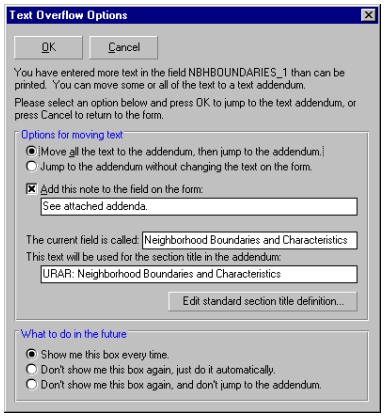
1. Type something into any field. Then leave the field.
2. Go back to the field, and you'll see an arrow for a drop down list appear on the left.
3. Click on the arrow and you'll see your last entry. You can also press ALT plus the down arrow key to access the list.

Addenda PowerView

Text addenda linked to your forms

When you enter more information than can fit in a comment field, WinTOTAL automatically switches you to the Addenda PowerView.

1. Go to the Site section of the URAR and type a few sentences into the comments section, enough to fill the field and cause the Text Overflow Options Dialog to appear.
   - You can either move the text to the addendum or jump to the addendum leaving your partial comment on the form.
   - A comment such as "See attached addenda." may be inserted in the current field.
   - Each field is also named and given a heading in the addenda. This gives your extended comments a more professional look and adds to readability.
2. Now click OK. At that point, your screen will split so you can switch between the form and the addendum at will.


Text Overflow Options
OK
Cancel
You have entered more text in the field NBHBOUNDARIES_1 than can be printed. You can move some or all of the text to a text addendum.
Please select an option below and press OK to jump to the text addendum, or press Cancel to return to the form.
Options for moving text
Move all the text to the addendum, then jump to the addendum.
Jump to the addendum without changing the text on the form.
Add this note to the field on the form:
See attached addenda.
The current field is called: Neighborhood Boundaries and Characteristics
This text will be used for the section title in the addendum:
URAR: Neighborhood Boundaries and Characteristics
Edit standard section title definition...
What to do in the future
Show me this box every time.
Don't show me this box again, just do it automatically.
Don't show me this box again, and don't jump to the addendum.

When you've entered more text than will fit in a field, WinTOTAL will automatically jump to the Addenda PowerView. You have several options available to determine how text is automatically carried to the addendum, what gets left on the form and an automatic heading for the section in the addenda.

3. Use the Addendum writer just like a word processor. It supports Text Databasing comments so you can easily insert your favorite verbiage without retyping. You can also create Text Database comments while in the Addenda PowerView. With near compatibility with Microsoft Word 2000, it even supports the pasting of formatted documents from the word processor into the appraisal addenda.
4. The automatic headings that are created keep track of which field the block of text is tied to, so when you jump back to the form, it will remember where you were.
5. To switch back to editing the appraisal form in full screen mode, click the Form PowerView.

Certain forms in WinTOTAL also use the same word processing engine as the Addenda PowerView, and you can enjoy full screen editing when accessing it through your forms list.

More information on creating extended comments as well as custom addenda is included in the Addenda PowerView chapter.

Comps PowerView

Comparables Database introduction

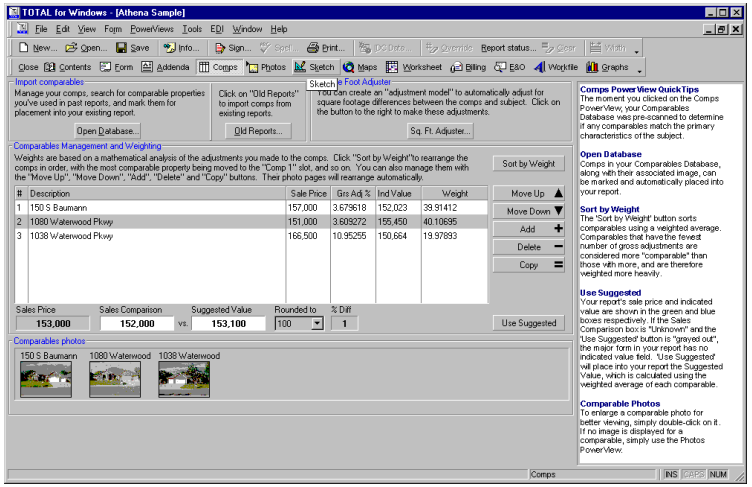
The first option in the Comps PowerView is the Comps Database. This is a powerful module that enables you to manage your comparable store - too in-depth for just an overview! Be sure to view our dedicated ***"Comps PowerView"*** chapter to learn how to use functions in the Comps Database such as:

- Importing reports from your File Cabinet
- Searching through comparables using our Intelligent Query model.
- Sorting and customizing
- Inserting comps from the database into a report.
- Viewing and cataloging photos with the comps database

Merging comps from existing reports

If you know of a specific report that has a comp in it you wish to use, you can easily pull it into your current report.

1. From the Comps PowerView, click the **Old Reports** button.

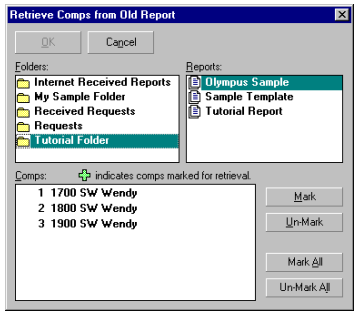


The Comps PowerView centralizes all comp functions into one area.

2. Browse the folders until you find the report with the comparable you need. For this example, go to the Tutorial Folder, and click the Sample Report.
3. When you click the report, it will show you the comparables in it.
4. To merge comparable one from the sample, just double-click it.
5. Then click OK.

Notice that the comparable from the sample is now listed on the comps PowerView with photos. By double-clicking the stamp-sized "thumbnail" photo, you can view it in full resolution.

If you need searching capabilities, you should use our Comparables Database for comp retrieval instead of this method.

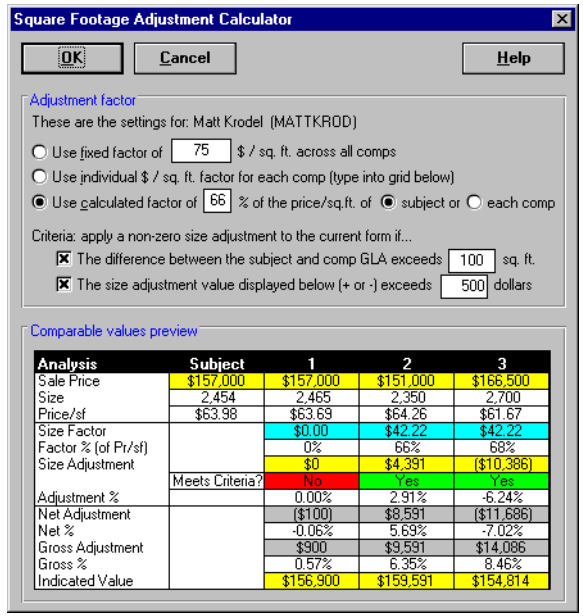


WinTOTAL makes it easy to pull comps from an existing report into your current one.

Shortcuts in comps grids on the forms

WinTOTAL has special keystrokes in comps sections of appraisal forms that save you from repetitive data entry.

1. First, we'll go to the major form. Click the Contents PowerView.
2. Double click the major form in your report - typically the URAR - as it appears in the right hand column for "Forms in this report."
3. Once in the form, we can skip straight to the sales comparison approach by clicking the tab at the bottom of the screen.
4. If you have been following this tutorial, you should have at least one comparable in your report - comp #1. Let's copy that entire column to comp #2. Put your cursor at the beginning of the first line of comp #2's address field.
5. Press the **=** key on your keyboard. A flyout menu will appear prompting you for the comp to copy. From here, just type the number of the comp to copy or you could use "**=**" again to wipe out the whole column. For now, press 1 and comp one will be copied to that column.
6. The "=" function may also be used on individual lineitems. Put your cursor in the location item for comp #3. Then, press "=".
7. This time when you choose a number, it will only copy that one item.


Square Footage Adjustment Calculator
OK
Cancel
Help
Adjustment factor
These are the settings for: Matt Krodel (MATTKROD)
Use fixed factor of 75 $ / sq. ft. across all comps
Use individual $ / sq. ft. factor for each comp (type into grid below)
Use calculated factor of 66 % of the price/sq.ft. of subject or each comp
Criteria: apply a non-zero size adjustment to the current form if...
The difference between the subject and comp GLA exceeds 100 sq. ft.
The size adjustment value displayed below (+ or -) exceeds 500 dollars
Comparable values preview

Analysis	Subject	1	2	3
Sale Price	$157,000	$157,000	$151,000	$166,500
Size	2,454	2,465	2,350	2,700
Price/sf	$63.98	$63.69	$64.26	$61.67
Size Factor		$0.00	$42.22	$42.22
Factor % (of Pr/sf)		0%	66%	66%
Size Adjustment		$0	$4,391	($10,386)
	Meets Criteria?	No	Yes	Yes
Adjustment %		0.00%	2.91%	-6.24%
Net Adjustment		($100)	$8,591	($11,686)
Net %		-0.06%	5.69%	-7.02%
Gross Adjustment		$900	$9,591	$14,086
Gross %		0.57%	6.35%	8.46%
Indicated Value		$156,900	$159,591	$154,814

The Square Footage Adjuster adjusts all three comparables at one time. It may be triggered from the Comps PowerView or from the Gross Living Area fields of any form's Sales Comparison section.

Square footage adjustments

The Square Footage Adjustment tool allows you to easily adjust for differences in the square footage of all comps in one easy step.

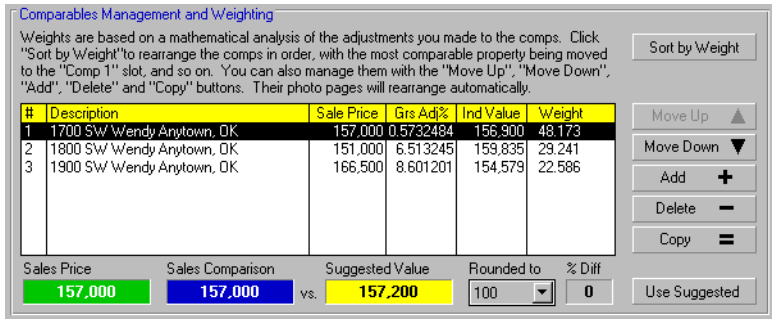
1. Ensure that the sales price and square footage for all comparables have been entered.
2. In the Comps PowerView, click on the **Sq. Ft. Adjuster** button.
3. The first section of the Square Footage Adjustment Calculator shows you the methods available for calculating the adjustment.
4. As you choose the method and set the parameters, the SF Adjuster shows you the resultant net/gross percentages.
5. Click OK to merge the adjustment figures into the current report.

If for some reason, you must change the square footage of a comparable, be sure to reload the SF Adjuster so that it can re-trigger the math.

Copying, swapping and rearranging comps

In the comparables listing, you can now see comparables with gross adjustments, indicated value and a relative weight that corresponds to the comparability of each property.

- WinTOTAL uses the weighted average to suggest a value. Click on **Use suggested** if you wish to put that value into your report.
- **Sort by weight** sorts the comps by their relative weight.
- **Move Up** and **Move Down** swap the highlighted comp with the one above or below it respectively.
- **Add** inserts a blank comp below the one selected.
- **Delete** removes the selected property and moves the others up one.
- **Copy** creates a copy of the currently selected comparable and inserts it below the current one, pushing the others down one position.


Comparables Management and Weighting
Weights are based on a mathematical analysis of the adjustments you made to the comps. Click "Sort by Weight"to rearrange the comps in order, with the most comparable property being moved to the "Comp 1" slot, and so on. You can also manage them with the "Move Up", "Move Down", "Add", "Delete" and "Copy" buttons. Their photo pages will rearrange automatically.
Sort by Weight
Description Sale Price Grs Adj% Ind Value Weight
1 1700 SW Wendy Anytown, OK 157,000 0.5732484 156,900 48.173
2 1800 SW Wendy Anytown, OK 151,000 6.513245 159,835 29.241
3 1900 SW Wendy Anytown, OK 166,500 8.601201 154,579 22.586
Move Up
Move Down
Add
Delete
Copy
Sales Price
Sales Comparison
Suggested Value
Rounded to
% Diff
157,000
157,000
vs.
157,200
100
0
Use Suggested

In one grid, the Comps PowerView lets you see how comparable each comp really is. Our exclusive weighting section rates your comparables and even suggests a value.

Maps PowerView

Easy access to all sources of maps

Click the Maps PowerView to see how all mapping related actions have been put in one place.

- Fast, easy maps available online.

- Or, use maps from practically any mapping program such as the widely available CD-ROM's.
- Scan plat and flood maps right into the Maps PowerView using any scanner supported through Windows and TWAIN.
- Add annotations such as addresses right on screen, no rub-ons and no re-typing of addresses.

Acquiring a map from the Internet

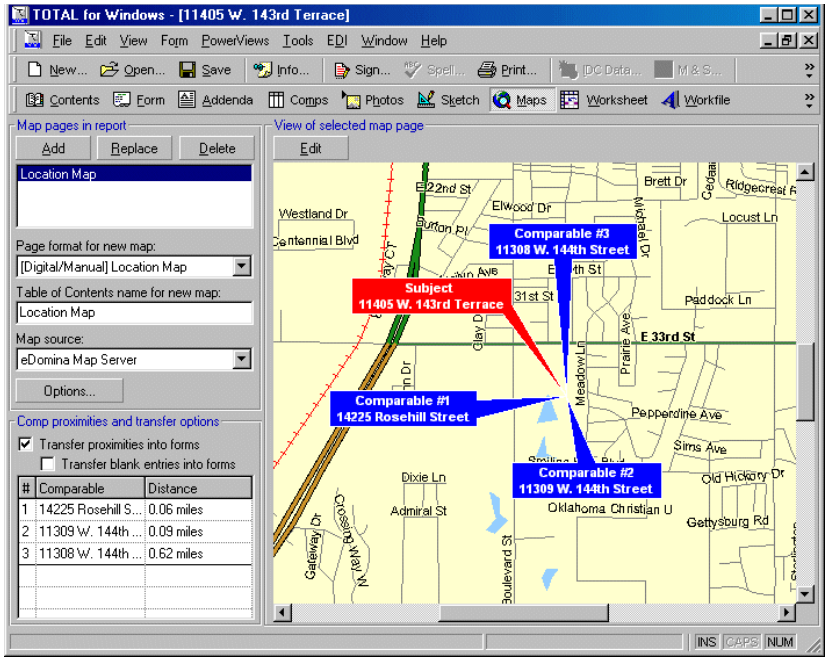
Your annual membership gives you access to high resolution, up-to-date location maps online. If you already have Internet access on your system, the cheapest and fastest way to get an up-to-date street level map is to let WinTOTAL download one for you.

1. If you haven't already, enter authentic addresses for the subject and comparable properties in your report. Then, come back to the Maps PowerView.
2. Verify the Map source item as the eDomina map server. Use the defaults for the map page and listing in the table of contents.
3. Click **Add**. You'll be prompted with a dialog to specify your map options for quality, automatic placement of labels and color schemes. These items should be self-apparent.
4. Then, click OK and stand by as WinTOTAL connects to the Internet and downloads a map. Depending on your address entries, you may be prompted to clarify the address info. Be sure that only the street address (not including unit numbers) with city, state and zip are in your address fields.

Adding map notes

This is where you can add a comment such as the address to the map.

1. Click on the **Annotate** tab.
2. Click the text note "balloon" item to make sure it's active.
3. Place the cursor, which should now look like a cross, where you want to place the note and click once.
4. After you have verified the address, click OK, and your note will be placed on screen.



WinTOTAL's online maps are one of its most popular features. Save loads of time and effort with every report by not having to worry about out of date CD's, low resolution images and rub-ons.

5. For the next property, just move your cursor over the place where you want the balloon and click again. It's automatically ready to place the next address!

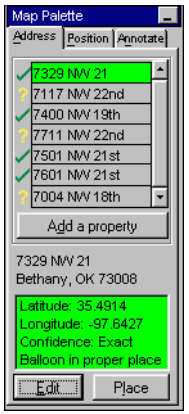
Repeat these steps as many times as needed for all of the comparables in your report. Then, click OK.

Note: If you prefer using your CD-ROM Maps: Start your CD-ROM Map program. After finding the map as you normally would, select **Copy** from your CD-ROM map program's **Edit** menu. Then, switch back to WinTOTAL and choose the **Clipboard** option instead of eDomina Map Server. Then, click OK.

Map Palette - Address Tab

One feature exclusive to maps downloaded from eDomina is the Address Tab of the Map Palette. Immediately after downloading a map, the Map Palette will appear on screen floating over the map. The Address Tab will be activated to let you know the confidence level of addresses it has marked. You have several options available to you:

- **Add another property.** The **Add a property** button enables you to enter the addresses of other properties such as listings or rentals which are not automatically imported into the Mapping Utility. After adding a new property, it will be sent to our geocoding server and placed on the map just as the other properties were.
- **Edit a property address.** If you notice a property with a question mark or red x is labeled as such because of a typographical error, click the property address in the Address Tab, and then click **Edit**. At that point, you can enter a new address and click **Place**; then see if the property is put on the right place on the map. (We'll discuss moving the balloon a little later.)
- **Move a caption.** If your balloons are overlapping, click the text on the balloon and drag it to a new location. Notice the anchor stays in place.
- **Delete a caption.** Click the balloon, and then press the DELETE key on your keyboard. You can always replace the caption by clicking the address and then clicking the **Place** button.



The Address section of the Map Palette tells you which properties were "found"

- **Reposition an anchor.** If the anchor is in the wrong spot and not pointing close enough to the property, carefully click the anchor point itself and drag it to the correct location. Notice the distance from the subject is automatically updated. Likewise, if you move the subject, all comp proximities are updated.

Map Palette - Position Tab

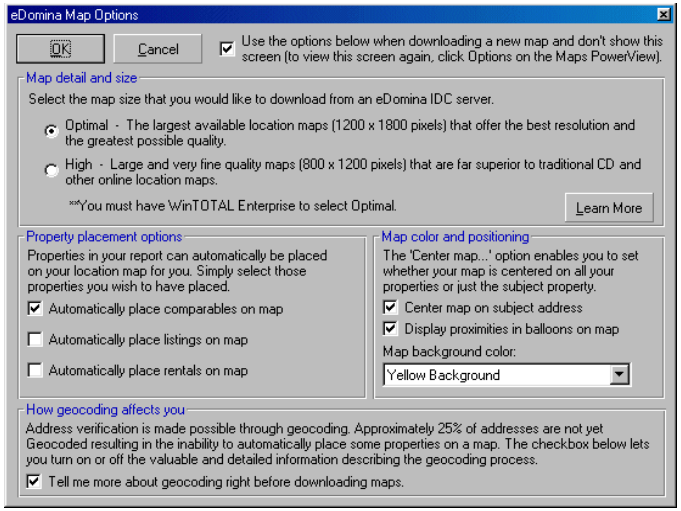
Click the tab labeled Position for functions that pan your map North, West, East or South as well as zoom in and zoom out. Each time you pan or zoom, a new map is downloaded from the server. However, this map should come across faster than the first one since your addresses are already geocoded.

See our special chapter on the *"Maps PowerView"* for more details on all location mapping related features in WinTOTAL.

Digital Workfile PowerView

The Digital Workfile is the first feature in appraisal software to address the concept of your workfile. Its purpose is to keep you from having to store paper copies of your reports or workfile. Items you insert into the digital workfile don't show up in your printed report - they are for your own internal usage.

1. To add a document, click Workfile, and then click Add.
2. Then choose the type of file you are inserting:
   - **Addenda.** Take advantage of WinTOTAL's word processing capabilities to write additional notes about the assignment.
   - **Image.** If you took extra digital photos that weren't part of the final report, you could save them here.
   - **Scanned Image.** Uses the standard TWAIN interface to accept scanned documents.
   - **Worksheet.** WinTOTAL's Worksheet function is a powerful spreadsheet application that enables you to define models and perform calculations.
   - **External Attachment**. Any other file such as a document from your word processor, a web page you saved, etc.


eDomina Map Options
OK
Cancel
Use the options below when downloading a new map and don't show this screen (to view this screen again, click Options on the Maps PowerView).
Map detail and size
Select the map size that you would like to download from an eDomina IDC server.
Optimal - The largest available location maps (1200 x 1800 pixels) that offer the best resolution and the greatest possible quality.
High - Large and very fine quality maps (800 x 1200 pixels) that are far superior to traditional CD and other online location maps.
**You must have WinTOTAL Enterprise to select Optimal.
Learn More
Property placement options
Properties in your report can automatically be placed on your location map for you. Simply select those properties you wish to have placed.
Automatically place comparables on map
Automatically place listings on map
Automatically place rentals on map
Map color and positioning
The 'Center map...' option enables you to set whether your map is centered on all your properties or just the subject property.
Center map on subject address
Display proximities in balloons on map
Map background color:
Yellow Background
How geocoding affects you
Address verification is made possible through geocoding. Approximately 25% of addresses are not yet Geocoded resulting in the inability to automatically place some properties on a map. The checkbox below lets you turn on or off the valuable and detailed information describing the geocoding process.
Tell me more about geocoding right before downloading maps.

A slew of options are available for you to customize how the maps work.

3. Then, enter a description for the list of documents and click OK.

For details on each format see our chapter on ***"Using the Digital Workfile"***.

Sketch PowerView

Benefits of electronic sketch

By including the sketch as part of your electronic report, you gain several benefits:

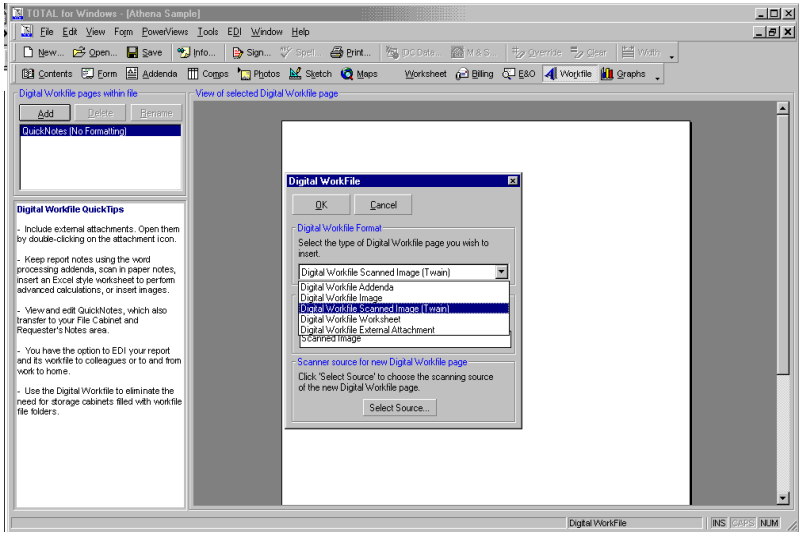
- Floorplan looks professional.
- Sketch is saved inside the report file with rest of data.
- Sketch prints on a WinTOTAL form with the rest of your report.
- Areas are calculated automatically and transferred to the forms.

Included with WinTOTAL Pro is the Apex IV Windows Sketching Library by Apex, Inc. If you prefer the WinSketch floorplan product, you can also integrate it with WinTOTAL Pro. Contact Jammin' Software for details.

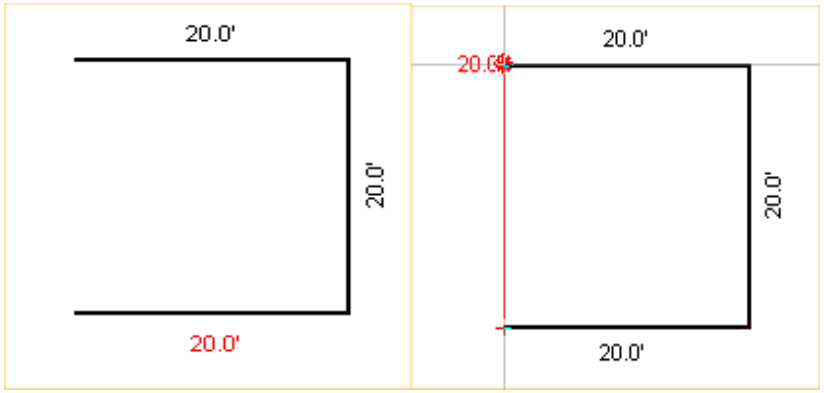
Integrating a sketch

To demonstrate the integration, let's draw a simple 20' square using Apex.

1. Click the Sketch PowerView now.
2. To start a sketch, just choose the page format from the drop down list and click **New**. Apex will automatically launch.
3. From the Apex **Draw** menu, and scroll to **Define Area**.
4. Click **First Floor**, and then click **OK**.
5. Change the name of the area to **Square**, and click **OK**.
6. Press **Enter** to change to the drawing cursor.
7. Type **20**, press [→], press [ENTER] twice.
8. Type **20**, press [↓], press [ENTER] twice.
9. Type **20**, press [←], press [ENTER] twice.
10. Type **20**, press [A] to autoclose the sketch, press [ENTER] twice.
11. Exit **Apex**. Notice that your square footage calculations are already entered in the Area Calculations area of the Sketch PowerView.


TOTAL for Windows - [Athena Sample]
Digital WorkFile
Digital Workfile QuickTips
Digital Workfile Format
Digital Workfile Scanned Image (Twain)
Scanner source for new Digital Workfile page
Select Source...

Want to store additional photos, sketch pages, scanned calculations that you may not



The red dimension and red line in these illustrations tell you that those items have yet to be placed.

Area transfer options

The Area calculations section of the Sketch PowerView enables you to:

- Turn transfers from the Sketch PowerView to the form on/off
- Override calculations generated by the sketch. (This is handy for things like basements and areas you don't include with your floorplan.)
- Include or exclude "blank" areas from transferring to the form.

Sketching wrap-up

There are a couple of things to remember when using Apex.

- Draw external walls with the keyboard and not the mouse.
- When integrating with WinTOTAL, do not use the File|New function or the File|Save As functions. They will break the link with WinTOTAL.

Although Apex is fairly simple, we recommend reading our dedicated ***"Apex and the Sketch PowerView"*** chapter. You'll save yourself a lot of "figuring out" time and learn things the right way with a detailed tutorial and numerous examples.

Worksheet PowerView

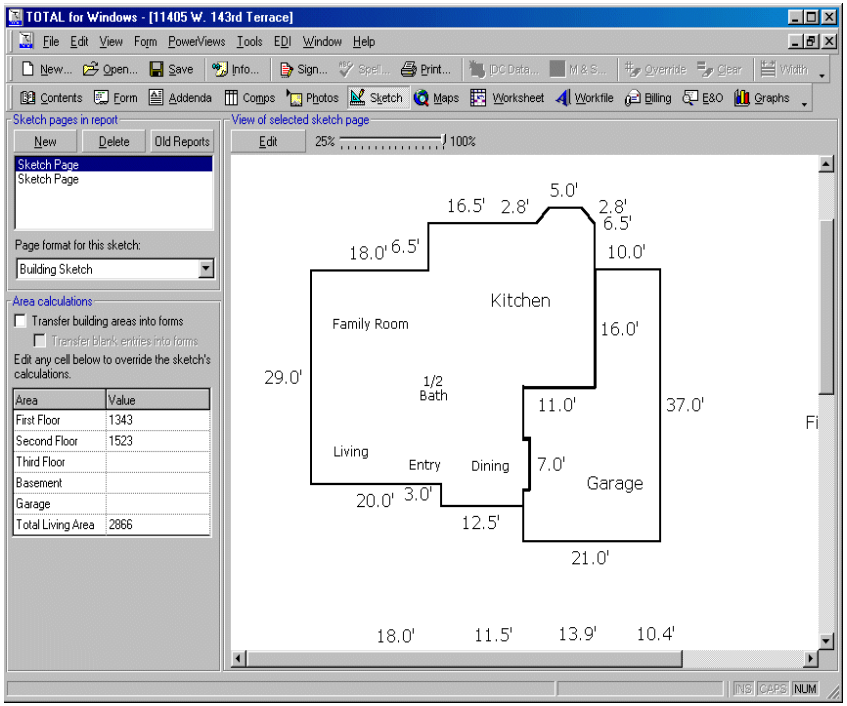
Build-in spreadsheets

The Worksheet PowerView provides spreadsheet functions right inside your appraisal report. It lets you set up your own custom calculations inside the form and even reads spreadsheets saved in MS Excel. If you are familiar with spreadsheets, then you'll be up and running in no time with this.

Using the sample

The sample template in WinTOTAL already has a sheet built into it. Here's how to use it:

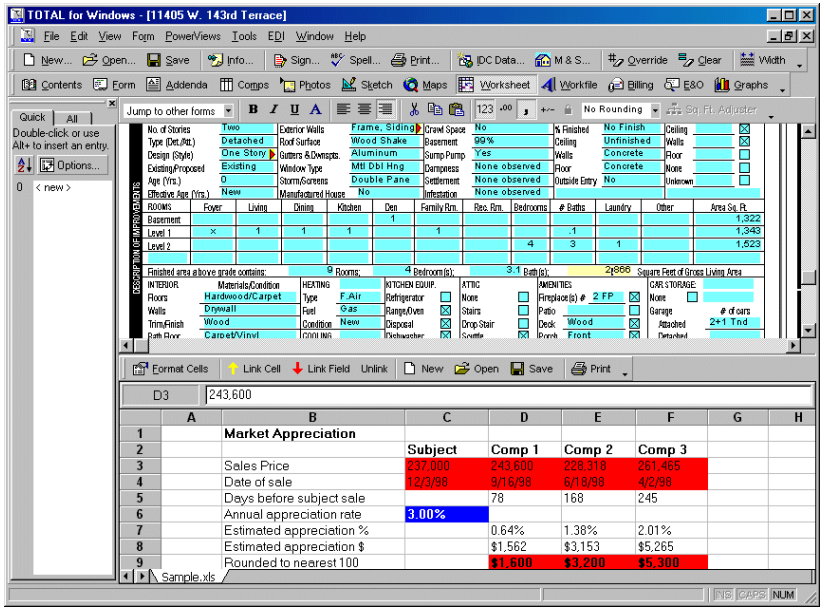
1. Click the Worksheet PowerView. You'll notice your screen splits.
2. If you don't see the cells filled on your screen, just load the sample worksheet by clicking the Open button in the WorkSheet PowerView, double-clicking on the **WRKSHEET** sub-folder and then double clicking on **SAMPLE.XLS**.



The Sketch PowerView shows the sketch you completed in an integrated sketcher such as Apex IV Windows or Jammin's WinSketch, as well as areas that have transferred in. When you integrate your sketch program into WinTOTAL, the floorplan is transferred onto one of WinTOTAL's pages so all the headers remain consistent.

3. The equations in this worksheet are tied to fields in the sales comparison section. The yellow fields on the worksheet indicate information that is being pushed back up into the form. Click on one of the yellow worksheet fields and notice the active field on the appraisal form switches to the field linked to that cell on the spreadsheet.
4. The red fields on the worksheet are places where data is being read from the form into the worksheet. Click on a red field and the cursor on the appraisal form will jump to its source.
5. The blue fields on our sample worksheet are colored blue simply to point out that is where you can change parameters for the calculations.
6. If the sale date, sale price, and room counts aren't filled for your subject, enter data in those fields now.
7. As you enter data in those fields, notice how it triggers the calculations in the Worksheet PowerView. The sample has equations to trigger automatic adjustments based on sale date and differences in the room count.
8. Click on the worksheet and enter a different yearly appreciation rate and see how the adjustments in the comps grid changes in both the worksheet and the form.

The worksheet in the sample is just that, a sample. You can add your own calculations to a worksheet and link it with any field of any form. Be sure to read our dedicated ***"Worksheet PowerView"*** chapter for details.



The WorkSheet PowerView gives you the flexibility of spreadsheet formulas to overwrite and enhance WinTOTAL's calculations.

Photos PowerView

Access photos from a variety of sources

The Photos PowerView is your one stop shop for placing digital images on your photo pages. In this one screen, you can access digital cameras, read files from the integrated database, browse a file directory or acquire from a scanner or other TWAIN device.

WinTOTAL can accept images from virtually any camera or imaging device. However, we have a built-in interface for a variety of cameras such as the Kodak DC40/50/120/200/210/220/260 as well as the Logitech Pixtura and Epson Photo PC 500/600/700 cameras. We also have a disk

interface which treats a floppy disk or folder as a digital camera, automating the process of file naming and logging photos in the database.

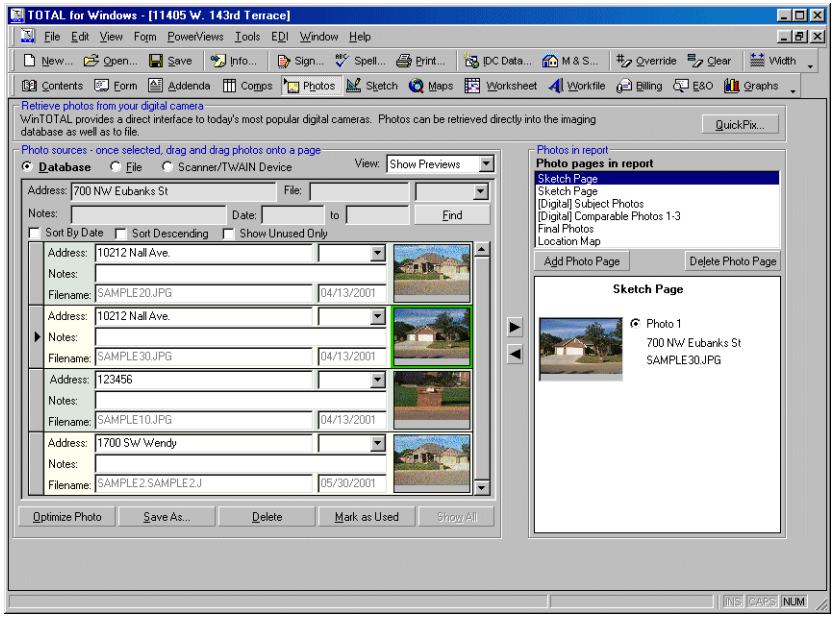
For this tutorial, we'll use sample photos. Be sure to read our dedicated chapter on the ***"Photos PowerView"*** *for details on digital images and connecting WinTOTAL to your digital camera.*

Putting a photo onto a photo page

On the right side of the Photos PowerView is a section labeled **Photo pages in report**. From previous sections of this chapter, we'll assume you added a couple of different photo pages into your report. If you didn't, revisit *"Starting a report from scratch"* on page 6.

1. Click the Comparable Photos Page, and you'll see three frames for three picture slots. WinTOTAL has photo pages that are both legal and letter sized. They are labeled as [small], [medium] and [large] for digital photos - corresponding to the size of the photo on the page. Previously, these were labeled [digital], [3X5] and [4X6] with [digital] having photos that were slightly smaller than 3X5.
2. In the Photos PowerView, click **Database**, and you'll see a list of sample photos that ship with WinTOTAL or ones that are on your system already. This list is superior to a mere file listing in that you can search it as well as filter it on unused photos only.
3. Click a photo in the list.
4. Drag it into a frame that appears at the right of the screen and it is now in your report.

If you access digital photos from a digital camera, diskette or card reader, we recommend clicking the QuickPix button and accessing them through QuickPix - even if you read them from A: drive. That way, you can track them in a database and not worry about their specific file name.



The Photos PowerView shows your image database as well as provides an easy way to insert photos onto your report pages.

E&O PowerView

Built-in error checking

Why let errors go out in your reports when WinTOTAL can find many of them for you automatically? WinTOTAL's Errors and Omissions checker checks for as many as 1200 different rules on the URAR form alone.

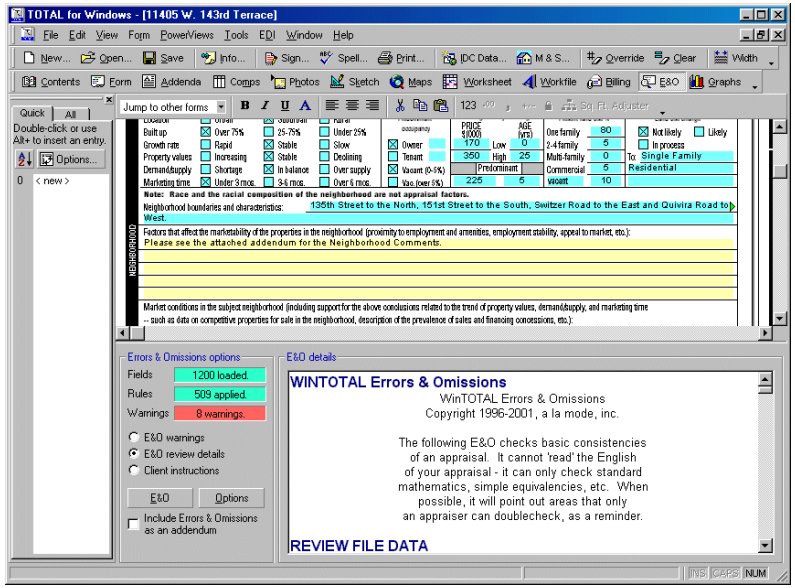
WinTOTAL's Image Optimizer goes beyond mere image enhancements. We set the DPI for your photos depending on how they are going to be used. This helps conserve disk space and improve EDI performance.

- Finds logic errors in the neighborhood section.
- Finds blank items and when multiple items are checked improperly.
- Compares comps grid against the neighborhood section.
- Has review “scripts” for over a dozen forms such as the URAR, 2055, 2065 704, Condo, SRIPAR and others.

Let’s load the sample report and run a review.

1. Click on **Open** to start the Office Manager.
2. Click the Tutorial Folder, then double click on the sample report. If asked to save changes in your current report, click Yes.
3. Click the E&O PowerView and stand by as it checks the report.
4. Scroll through the output to get a feel for what the guidelines reviewer detects. (We intentionally left errors in the sample.)
5. Errors are printed in red. When “E&O warnings” is marked, you can double-click an error and have WinTOTAL take you to that field on the form.

The E&O PowerView has options to view only the errors and to include these results in the report. And clicking the Options button enables you to customize certain percentages it uses when running checks.


TOTAL for Windows - [11405 W. 143rd Terrace]
Errors & Omissions options
Fields 1200 loaded.
Rules 509 applied.
Warnings 8 warnings.
E&O details
WINTOTAL Errors & Omissions
WinTOTAL Errors & Omissions
Copyright 1996-2001, a la mode, inc.
The following E&O checks basic consistencies of an appraisal. It cannot 'read' the English of your appraisal - it can only check standard mathematics, simple equivalencies, etc. When possible, it will point out areas that only an appraiser can doublecheck, as a reminder.
REVIEW FILE DATA

WinTOTAL’s E&O PowerView provides the most comprehensive guidelines reviewer in the industry. If your report has errors, you can click them in the review results and automatically be taken to the corresponding field on the form.

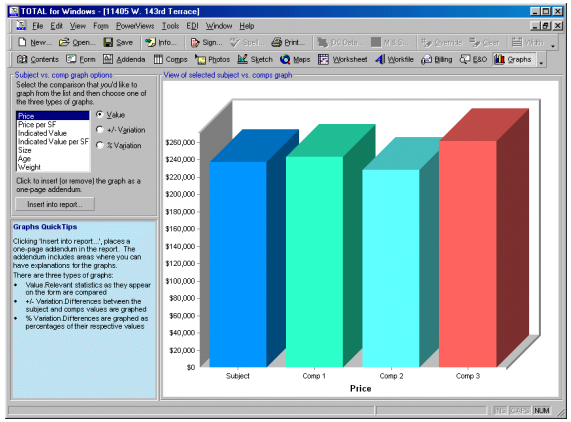
Graphs PowerView

A picture is worth a thousand words

Just like the E&O PowerView, the Graphs PowerView can help point out inconsistencies in your reports. The graphs can also be useful for supporting value conclusions.

- Click on the Graphs PowerView.
- On the left are seven items for you to compare.
- On the right, is how you are comparing them.

At the top left is an option for you to insert the current graph into your report. WinTOTAL will automatically add a form with the appropriate graph on it. If a graph has already been used in your report, the button will give the option to remove it.



Add flair to your reports with the Graphs PowerView.

Billing PowerView

The Billing PowerView is your gateway to generating invoices for your clients. This is where you can choose the style of invoice for your report and jump to the billing information in the appraisal information dialog.

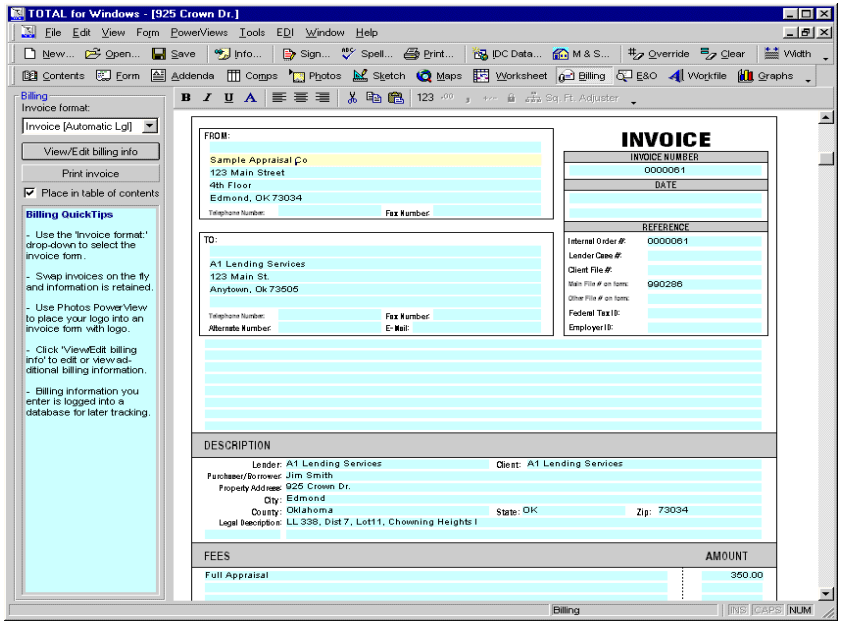
- You can change the invoice style mid-stream by choosing a different form from the Invoice format list.
- Be sure you have used the Address Book for your “Bill To” entry and have filled our your “Local Office Settings” through the Contacts area of the Appraisal Desktop. Otherwise, you will have blank areas in your invoice - even if you type into them - because they are hot-linked to your database. This saves time in the long run, however.
- Unlike previous versions, WinTOTAL will retain billing lineitems you type into the automatic forms and even transfer it back to the appraisal information (i.e. “request”) screen. Just be sure to use the Requester for the Bill To and entries in your Local Office Settings for your address!

More details on setting up fee tables and running management reports is in our chapter dedicated to ***“Payments and Order Tracking”***.

Using a form with a logo

You’ll need to have your logo scanned before doing this. Many copy shops can do this, or you could use your own scanner. WinTOTAL will accept a variety of formats.

1. Click on the drop-down list for Invoice format. and choose a form that has [logo] in the name.
2. Right-click in the image area at the top of the Invoice preview.
3. Choose Load Photo From File. Browse through the drives/directories on your system until you find the one that contains your company’s logo. Click OK on the directory.
4. Click on your logo in the list of files, then click **Open**.



WinTOTAL’s [Automatic] invoice forms tie into our accounting module that lets you automatically assign fees and manage splits with the appraisers in your office.

Printing Overview

WinTOTAL’s printing is second to none. No other program returns control back to your system faster or gives you more options. Since printing is so integral to WinTOTAL, we’ll cover all the aspects of printing right here.

Getting Started

To print a report, click the Print button on the toolbar. The printing dialog in WinTOTAL is a tabbed dialog with three screens of options.

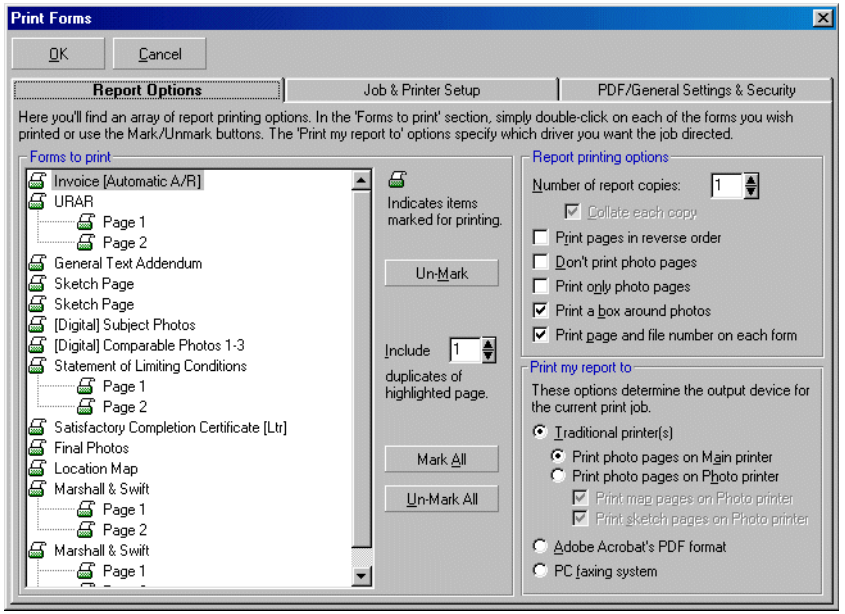
- The first tab you see is the main one you'll use after WinTOTAL is configured for your printer.
- You may click on Mark All to mark all pages for printing or double click on individual forms to mark them for printing. A printer icon appears next to each form that is marked to print.
- To “un-mark” a form and omit it from printing, just double-click it again.
- Copies can be set individually per form. Just click once on the form and change the number next to the Include ___ duplicates of highlighted page label.
- WinTOTAL will remember which pages you printed on a report-by-report basis.
- Once you have selected your printing options, click OK and the job will begin printing.

Individual forms can also be printed using the Print current form item from the WinTOTAL File menu.

Additional printing options

At the top right of the main printing window are other options. Most are self-explanatory.

- You can specify the number of copies of the print job by changing the Number of report copies option. If you have multiples of a particular page, note it will multiply those copies.
- Collating the copies is a handy new feature. Choosing this option is convenient, but it does take longer since WinTOTAL must spool each copy separately instead relying on your print driver to process the copies.
- Options for printing only are not printing photo pages are useful for times when you wish to print draft copies. Quite often, appraisers will print and proof the b&w pages before printing the photo pages. This keeps you from having to select these pages individually. If you choose an option such as “Don't print photo pages” be sure to turn it back off when you want to print photos!


Print Forms
OK
Cancel
Report Options
Job & Printer Setup
PDF/General Settings & Security
Here you'll find an array of report printing options. In the 'Forms to print' section, simply double-click on each of the forms you wish printed or use the Mark/Unmark buttons. The 'Print my report to' options specify which driver you want the job directed.
Forms to print
Invoice [Automatic A/R]
URAR
Page 1
Page 2
General Text Addendum
Sketch Page
Sketch Page
[Digital] Subject Photos
[Digital] Comparable Photos 1-3
Statement of Limiting Conditions
Page 1
Page 2
Satisfactory Completion Certificate [Ltr]
Final Photos
Location Map
Marshall & Swift
Page 1
Page 2
Marshall & Swift
Page 1
Indicates items marked for printing.
Un-Mark
Include 1 duplicates of highlighted page.
Mark All
Un-Mark All
Report printing options
Number of report copies: 1
Collate each copy
Print pages in reverse order
Don't print photo pages
Print only photo pages
Print a box around photos
Print page and file number on each form
Print my report to
These options determine the output device for the current print job.
Traditional printer(s)
Print photo pages on Main printer
Print photo pages on Photo printer
Print map pages on Photo printer
Print sketch pages on Photo printer
Adobe Acrobat's PDF format
PC faxing system

WinTOTAL's printing capabilities are second to none. Whether you create traditional hard copies, send files via PDF or use a PC faxing system, you can make creating output an effortless task with Athena.

- Our print file and page number feature will overlay the main file number at the top right of each form in the report. This is handy for forms that do not have a place for a file number. Of course, a page number gives your report a more professional appearance and keeps pages from being misplaced.

On the bottom right of the window is an area where you can specify where to output your report. Your options here will depend on printers you have setup in WinTOTAL – which is described in Job and Printer Setup.

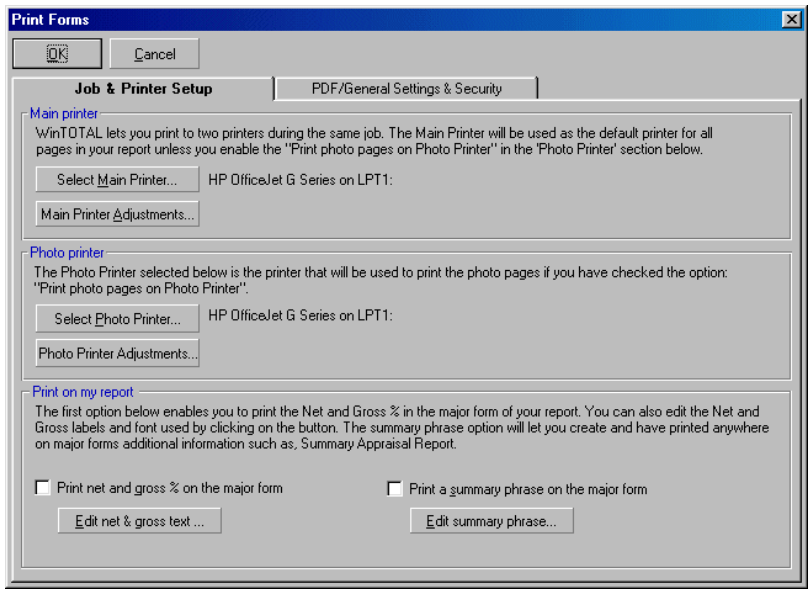
- Your traditional printers are for paper hard-copies. You can choose to output photo pages on your main printer for economical file copies.
- You may also choose to output your report to the Adobe PDF format if you have purchased and installed the full-version of Acrobat (not just the free reader). Note that our EDI functions encapsulate the PDF creation process; therefore if you use our EDI tools, you will rarely need to output a PDF this way. WinTOTAL also has a Print to PDF option in the File menu.
- If you have purchased faxing software such as Symantec's WinFAX Pro. WinTOTAL can also be set up to send straight to your PC faxing system without you having to adjust your print setup by clicking this option.

Job and Printer Setup

Click the Job and Printer Setup tab to configure items for printing. Once you set these options, they are remembered for future reports.

WinTOTAL is capable of printing to two printers simultaneously if you have two ports installed on your system. Installing an extra LPT port is often cheaper than using a switchbox and more reliable. Why print your photo pages and forms in separate batches when you can install a second port for less than $50. Other ways of achieving a second port is to use a USB to parallel adapter or mapping a printer port over your network.

- Click Select Main Printer and choose the printer for your b&w laser forms. The list that is displayed is a list of printers already installed on your system.


Print Forms
OK
Cancel
Job & Printer Setup
PDF/General Settings & Security
Main printer
WinTOTAL lets you print to two printers during the same job. The Main Printer will be used as the default printer for all pages in your report unless you enable the "Print photo pages on Photo Printer" in the 'Photo Printer' section below.
Select Main Printer...
HP OfficeJet G Series on LPT1:
Main Printer Adjustments...
Photo printer
The Photo Printer selected below is the printer that will be used to print the photo pages if you have checked the option: "Print photo pages on Photo Printer".
Select Photo Printer...
HP OfficeJet G Series on LPT1:
Photo Printer Adjustments...
Print on my report
The first option below enables you to print the Net and Gross % in the major form of your report. You can also edit the Net and Gross labels and font used by clicking on the button. The summary phrase option will let you create and have printed anywhere on major forms additional information such as, Summary Appraisal Report.
Print net and gross % on the major form
Edit net & gross text ...
Print a summary phrase on the major form
Edit summary phrase...

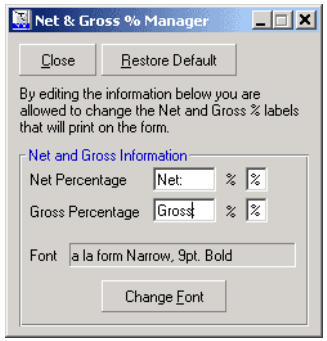
There's no sense using a switchbox when WinTOTAL will direct output to two different printers simultaneously. All you need is a second LPT port - connected via a card in your system, USB, or on a network.

- Likewise, if you have a separate photo printer, click Select Photo Printer and choose the printer you wish to use for pages that contain digital images. Note that WinTOTAL gives options to send sketch and map pages to your laser printer since many appraisers prefer those pages to be printed in black and white.

Printing net and gross adjustments

Most forms themselves do not have specific fields for net and gross adjustments; however, many appraisers prefer to have them overlayed in the sales comparison approach.

If you wish to have the net and gross percentages printed, check the option in the Print Setup screen to do so. The "Edit net and gross text" item enables you to specify how they are labeled.



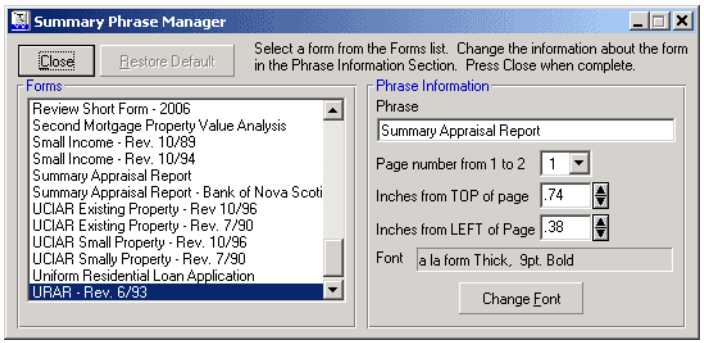
Net and Gross adjustments may be overlayed in the sales comparison section through an option in the Job and Printer Setup tab of your WinTOTAL Print dialog.

Overlaying a "summary phrase"

USPAP requires the appraiser to identify the appraisal and report type. For the URAR and most forms, this means putting "Summary Appraisal Report" at the top of the form. The Summary Phrase feature in the Print Setup dialog enables you to specify a different phrase for every form (since some may say "Limited Appraisal Report".

Instead of overlaying a summary phrase, you may wish to use our USPAP identification form. It provides more detail on the appraisal and report as well as room for comments and other disclaimers.

1. Go to the Contents PowerView.
2. Click **Search.**
3. Enter **USPAP** in the search dialog and press ENTER.
4. Then, press F3 until you see the form labeled "USPAP Identification".
5. Double click the form, and it will be inserted into your current report. You may wish to do this to any reports you use as templates, too.


Summary Phrase Manager
Close
Restore Default
Select a form from the Forms list. Change the information about the form in the Phrase Information Section. Press Close when complete.
Forms
Review Short Form - 2006
Second Mortgage Property Value Analysis
Small Income - Rev. 10/89
Small Income - Rev. 10/94
Summary Appraisal Report
Summary Appraisal Report - Bank of Nova Scoti
UCIAR Existing Property - Rev 10/96
UCIAR Existing Property - Rev. 7/90
UCIAR Small Property - Rev. 10/96
UCIAR Smally Property - Rev. 7/90
Uniform Residential Loan Application
URAR - Rev. 6/93
Phrase Information
Phrase
Summary Appraisal Report
Page number from 1 to 2
1
Inches from TOP of page
.74
Inches from LEFT of Page
.38
Font
a la form Thick, 9pt. Bold
Change Font

The easiest way to have "Summary Appraisal Report on your forms is to configure it through the Summary Phrase Manager in the Job and Printer Setup tab of your WinTOTAL Print dialog.

Printer adjustments for compatibility

Although not required often, we supply "printer adjustments" to optimize printing or work around potential problems you may encounter. These are set separately for each printer. Most people do not need to work with these items, but they exist to ensure WinTOTAL will be compatible with practically any of yesterday's, today's and tomorrow's printers. The most common items that may need to be changed from the default are:

- **Optimize rectangles for HP Laser Jets.** If lines are not printing on your forms, you may need to enable/disable this option.
- **Optimize sketch printing for HP Deskjets.** This overcomes driver errors that can occur when printing sketch pages.

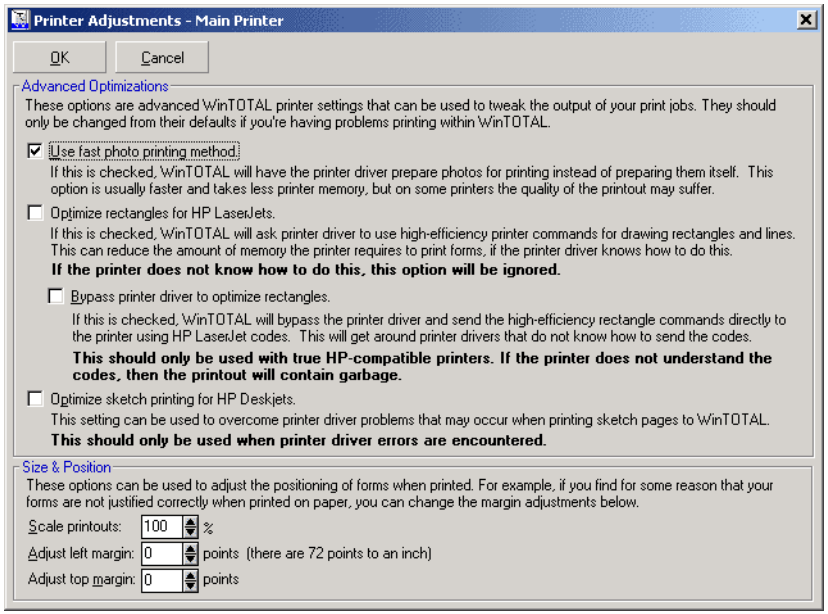
WinTOTAL also gives options to control the scale of the form and margins in case your particular printer cuts off part of the form or doesn't center it appropriately.

More Chapters

Now that we've given you an overview of WinTOTAL, we suggest the following:

- **Experiment!** Click on buttons that you don't know how to use, try various features and options (there are many more than we showed you here), and otherwise "push the envelope". You won't learn unless you try the new things in the program. Learn on "sample" files instead of real reports. Don't let a deadline make you "panicky".
- Take the time to routinely check for Instant Customer Updates. The program is updated as often as twice a month. Part of your standard annual membership includes these updates which provide you with new forms, new features and more things to make you productive.

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.


Printer Adjustments - Main Printer
OK
Cancel
Advanced Optimizations
These options are advanced WinTOTAL printer settings that can be used to tweak the output of your print jobs. They should only be changed from their defaults if you're having problems printing within WinTOTAL.
Use fast photo printing method.
If this is checked, WinTOTAL will have the printer driver prepare photos for printing instead of preparing them itself. This option is usually faster and takes less printer memory, but on some printers the quality of the printout may suffer.
Optimize rectangles for HP LaserJets.
If this is checked, WinTOTAL will ask printer driver to use high-efficiency printer commands for drawing rectangles and lines. This can reduce the amount of memory the printer requires to print forms, if the printer driver knows how to do this.
If the printer does not know how to do this, this option will be ignored.
Bypass printer driver to optimize rectangles.
If this is checked, WinTOTAL will bypass the printer driver and send the high-efficiency rectangle commands directly to the printer using HP LaserJet codes. This will get around printer drivers that do not know how to send the codes.
This should only be used with true HP-compatible printers. If the printer does not understand the codes, then the printout will contain garbage.
Optimize sketch printing for HP Deskjets.
This setting can be used to overcome printer driver problems that may occur when printing sketch pages to WinTOTAL.
This should only be used when printer driver errors are encountered.
Size & Position
These options can be used to adjust the positioning of forms when printed. For example, if you find for some reason that your forms are not justified correctly when printed on paper, you can change the margin adjustments below.
Scale printouts: 100 %
Adjust left margin: 0 points (there are 72 points to an inch)
Adjust top margin: 0 points

Although not necessary on most printers, you can adjust scaling and whether or not to optimize WinTOTAL for low-memory laser printers by clicking Printer Adjustments in the Job and Printer Setup tab of the WinTOTAL's Print dialog.

Form PowerView

Form PowerView

This chapter will take you through the rest of the functions in the Form PowerView. It will cover:

- Text Database Options
- Default Data and Formatting
- Tab Override feature
- File Operations
- Data Transfers
- Additional Options in the Form

Text Database Options

QuickLists reduce typing

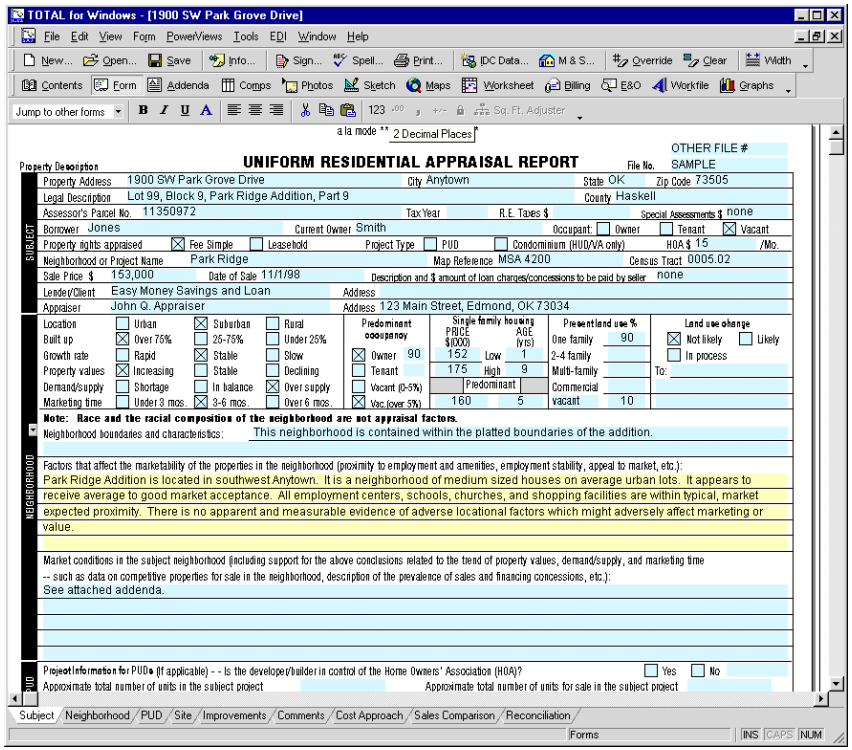
In our ***"Welcome to Athena"*** guide, we covered the essentials of using the QuickLists in WinTOTAL. This section assumes you already know the basics of creating and using QuickList comments and digs deeper into more options associated with them.

The QuickLists are the most efficient way to keep from retyping entries over and over. Many appraisers new to WinTOTAL mistake the common responses for the QuickList. But those that have taken time to learn WinTOTAL (or have attended one of our seminars conducted over the years) enjoy the true power of assigning hot keys to certain responses as well as having control over what responses are in their list.

Copy/Paste QuickList

If you have a set of QuickLists setup for one field, you can easily copy them to another field. WinTOTAL does this automatically for items in the sales comparison section. Here's an example using the Heating and Cooling sections in the URAR:

1. In the condition field for Heating, type the word **adeq.**
2. Click a blank quicklist entry and confirm the keyname as WinTOTAL adds that comment to the heating/condition fields quicklist.
3. Go back to the condition field and press CTRL+K to clear it.
4. Type the word **new** and click another blank QuickList entry to add it.


TOTAL for Windows - [1900 SW Park Grove Drive]
UNIFORM RESIDENTIAL APPRAISAL REPORT
Property Address 1900 SW Park Grove Drive
City Anytown
State OK
Zip Code 73505
Legal Description Lot 99, Block 9, Park Ridge Addition, Part 9
County Haskell
Assessor's Parcel No. 11350972
Borrower Jones
Current Owner Smith
Neighborhood or Project Name Park Ridge
Sale Price $ 153,000
Date of Sale 11/1/98
Lender/Client Easy Money Savings and Loan
Appraiser John Q. Appraiser
Address 123 Main Street, Edmond, OK 73034
Note: Race and the racial composition of the neighborhood are not appraisal factors.
Neighborhood boundaries and characteristics: This neighborhood is contained within the platted boundaries of the addition.
Factors that affect the marketability of the properties in the neighborhood (proximity to employment and amenities, employment stability, appeal to market, etc.):
Park Ridge Addition is located in southwest Anytown. It is a neighborhood of medium sized houses on average urban lots. It appears to receive average to good market acceptance. All employment centers, schools, churches, and shopping facilities are within typical, market expected proximity. There is no apparent and measurable evidence of adverse locational factors which might adversely affect marketing or value.
Market conditions in the subject neighborhood (including support for the above conclusions related to the trend of property values, demand/supply, and marketing time -- such as data on competitive properties for sale in the neighborhood, description of the prevalence of sales and financing concessions, etc.):
See attached addenda.
Subject
Neighborhood
PUD
Site
Improvements
Comments
Cost Approach
Sales Comparison
Reconciliation
Forms

The Form PowerView is where you do data most entry.

5. Now, go to the **Edit** menu and choose **Copy QuickList**.
6. Click in the condition field of the **Cooling** section.
7. Click on the **Edit** menu and choose **Paste QuickList**.

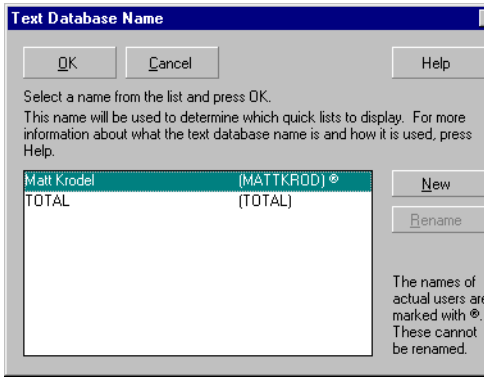
You should now have an identical set of QuickLists for these fields.

Change to a different set of QuickLists

WinTOTAL allows you to switch to a different Text Database, thus changing the QuickLists you see for each field. This can be handy on networks or if you like to have different QuickLists for different forms.

1. Click the Edit menu
2. Choose Change TextDB name.
3. Select a name from the list and click OK.

You can switch to a different Text Database / QuickList profile by changing the Text Database User name.


Text Database Name
OK
Cancel
Help
Select a name from the list and press OK.
This name will be used to determine which quick lists to display. For more information about what the text database name is and how it is used, press Help.
Matt Krodel
(MATTKROD) ®
TOTAL
(TOTAL)
New
Rename
The names of actual users are marked with ®. These cannot be renamed.

Moving the Text Database palette

With the release of WinTOTAL version 4.0, we have moved our Text Databasing and All Comments to the left side of the screen by default.

The Text Database palette can be moved around the screen by clicking the handle bar at the top of the window and dragging it to another place on screen. Drag it to the far left or far right to lock it in place.

The Text TB and the All Comments column will appear by default. To hide the Text DB, press F9. Press F9 again to bring it back.

Using the All Comments area

To activate the All column, click the **All** tab at the top of the Quick list column. This is a super-set of all the comments you may have created for each field. To use a comment from the “All” list, double click it.

Other functions are available when you right click a comment in the All Comments list.

- Use places the comment associated with that key into the current field on your form.
- Delete will remove that entry from the Text Database altogether.
- Add to QuickList will add that Text Database entry to the current field’s QuickList.

Form PowerView

Other functions in the QuickList area

The QuickList is by far the most common access point to the text database. Click back to it and lets talk about some other features.

Sorting. The button above the list with the arrow on it enables you to sort your list alphabetically.

Options. This gives you east access to other QuickList functions.

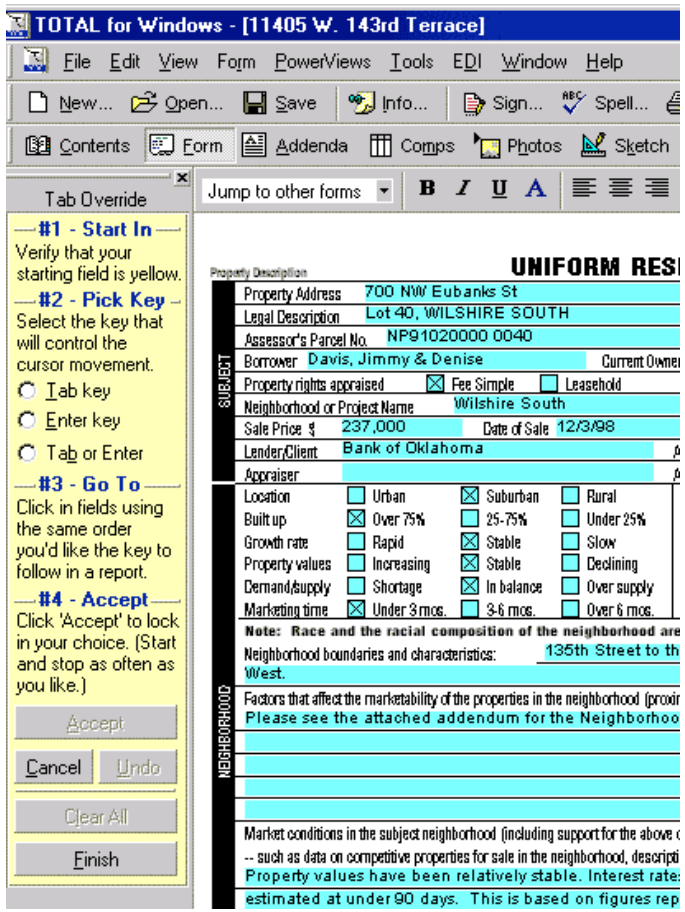
- **Create new text database.** This will create and switch you to a completely blank text database.
- **Show this forms entries only.** The QuickList knows in which form an entry was created. This option can keep you from using QuickList items not formatted for the current form and can also make the list shorter and easier to use.
- **Resequence QuickList.** This is a more powerful sorting feature that enables you to specifically order your comments. Simply click a comment and use the Up/Down buttons to change its order in the list.

Text Database Shortcuts

- You may press ALT+0 to add the current field's entry to the QuickList.
- You can type a Text Database keyname into a field and press CTRL+Q to insert the comment associated with that keyname.
- F9 will toggle the QuickLists as visible/hidden.
- **The QuickLists can be configured to chain together multiple comments in one field. Click Tools, then Configure, then Data Entry and then Formfilling to see the options.**

Tab Override

The Tab Override feature was developed to let users define the movement of their cursor within individual fields in a report. This time saving feature can be used in either the entire form or any section of the form in WinTOTAL. The following description is a step by step guide to help you in setting your movements through your report using the Tab Override feature:


TOTAL for Windows - [11405 W. 143rd Terrace]
File Edit View Form PowerViews Tools EDI Window Help
New... Open... Save Info... Sign... Spell...
Contents Form Addenda Comps Photos Sketch
Tab Override
Jump to other forms
#1 - Start In
Verify that your starting field is yellow.
#2 - Pick Key
Select the key that will control the cursor movement.
Tab key
Enter key
Tab or Enter
#3 - Go To
Click in fields using the same order you'd like the key to follow in a report.
#4 - Accept
Click 'Accept' to lock in your choice. (Start and stop as often as you like.)
Accept
Cancel
Undo
Clear All
Finish
UNIFORM RESI
Property Address 700 NW Eubanks St
Legal Description Lot 40, WILSHIRE SOUTH
Assessor's Parcel No. NP91020000 0040
Borrower Davis, Jimmy & Denise
Property rights appraised Fee Simple Leasehold
Neighborhood or Project Name Wilshire South
Sale Price $ 237,000 Date of Sale 12/3/98
Lender/Client Bank of Oklahoma
Appraiser
SUBJECT
Location Urban Suburban Rural
Built up Over 75% 25-75% Under 25%
Growth rate Rapid Stable Slow
Property values Increasing Stable Declining
Demand/supply Shortage In balance Over supply
Marketing time Under 3 mos. 3-6 mos. Over 6 mos.
Note: Race and the racial composition of the neighborhood are
Neighborhood boundaries and characteristics: 135th Street to th
West.
Factors that affect the marketability of the properties in the neighborhood (proxi
Please see the attached addendum for the Neighborhoo
NEIGHBORHOOD
Market conditions in the subject neighborhood (including support for the above
-- such as data on competitive properties for sale in the neighborhood, descripti
Property values have been relatively stable. Interest rate
estimated at under 90 days. This is based on figures rep

Press F10 to see WinTOTAL's options for letting you configure movement of your cursor when you use the TAB key to go between fields.

Form PowerView

Starting the Tab Override and selecting your movement

Before you launch the Tab Override, make sure that your cursor is in the location where you would like to begin to define the custom movement s. Your starting point should be highlighted in yellow.

1. Click the F10 key at the top of your keyboard.
2. From there, you will see the see the Tab Override table appear on the left side of your screen.
3. Verify that your cursor is in the proper starting location and is highlighted in yellow.
4. Click which key you would like to use to set the custom options:

- TAB
- ENTER
- TAB or ENTER

5. After you have selected your keystroke, click in the fields using the same order you would like the key to follow in the report.
6. As you click through the fields, the cell should turn to a grey color letting you know that the cell has been selected in the movement pattern.

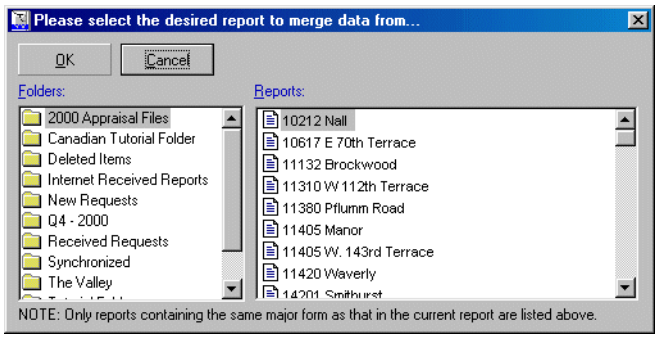
Saving your selections

Once you have completed your selections, you will want to save the choices that you have made.

To save your customized movement, do the following steps:

- Click Accept to lock your choices.
- Then click Finish

Remember: You can start and stop the Tab Override feature as many times as you like. To complete multiple sections of a report, repeat the steps above for each section you would like to customize.



Save time by merging data from existing reports on your system.

Form PowerView

File Operations

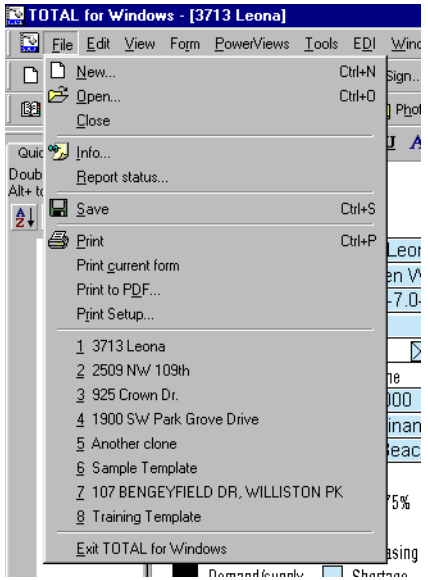
Merge data from an existing report

WinTOTAL allows you to copy in form data from another job after you've already opened the current report. This can be handy if you have a request that wasn't created from cloning.

1. Open the report that needs data copied into it.
2. Click on the **Form** menu and choose **Merge Data from an Existing Report**.
3. Browse through your Office Manager folders for the source report.
4. Click on the report you want to merge into the current one.
5. Click OK and confirm the action.

Most Recently Used list

WinTOTAL keeps a "Most Recently Used" list in the **File** menu. This gives you quick access to your last reports. This is faster than going through the Office Manager. Just click on the **File** menu and choose the report description. It will be opened immediately.



WinTOTAL's File menu remembers the last 10 files you opened. This can be faster than going through the File Cabinet.

Default Data and Formatting

Save custom formatting

WinTOTAL can store custom formatting such as text alignment, rounding, commas, etc.… This can come in quite handy if you continually have to use F6 to override our settings or are always customizing the formats.

1. Load the form and make adjustments to formatting in any fields that require it.
2. Click on the **Form** menu, and choose the item **Default field formats**.
3. You then have three options:

- **Save formats as new default:** This will save the formats currently in the form as that form's default to preload on all new files.
- **Load default formats:** This will merge the default formats with the current information in the report and do away with formatting customizations.

- **Restore standard default formats**: This will reset the default formats with the original information that shipped with WinTOTAL.

Setting default data

Default data is information that is automatically loaded into a form the first time it is used in a report. Default data is useful for changing the headings on addenda forms or adding terms to your invoice forms.

1. Start with a new report and load the form in which you want to create some default information.
2. From the **Edit** menu, select **Clear entire form**. This will blank everything out of the form.
3. From the Form menu, select the item **Default field data** and then **Load default data**. (This is in case we had items in there that you thought were part of the form, but really data.)
4. Now enter the data into fields that you'll want "pre-filled" for all new reports.
5. From the **Form** menu, select **Default field data**, then **Save data as new default**.

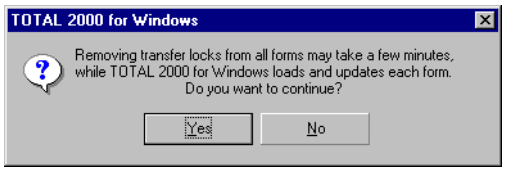
Transfers to and from Forms

How transfers work

WinTOTAL incorporates years of experience to make its transfers intuitive and exactly as you'd expect. This latest version of WinTOTAL introduces major departures from past transfer schemes.

- **Transfers between the Requester and the major form in your report are bi-directional.** When you click on Save in the Request screen, that information is pushed into the major form. Likewise, when you click Save in the report's major form, that information is pushed back into the Request screen.
- Information is transferred to the Request from minor forms, such as addenda and photo pages, only when the field in the Request is blank. This is a rare occurrence.
- When cloning reports created in previous versions, WinTOTAL will automatically lock non-blank fields on minor forms that differ from their counterpart in the major form. An option in the Requester gives

When you choose the menu option to remove locks from all forms, you will be prompted with a confirmation.


TOTAL 2000 for Windows
Removing transfer locks from all forms may take a few minutes, while TOTAL 2000 for Windows loads and updates each form.
Do you want to continue?
Yes
No

you the ability to automatically remove those locks on the cloned report without affecting the original.

By default, WinTOTAL doesn't prompt you when the transfers are taking place because the vast majority wants all the information between forms and the request to be consistent. You can change default transfer settings by clicking on **Options** and then **Configure**.

Locking fields from transfers

If you need different information in a field on a minor form than what was transferred by default, simply jump to the minor form and make the change. WinTOTAL will automatically lock the field from the transfer.

- The field will turn a different color.
- You'll also see the "lock" button appear pressed.
- If you click on the Form menu while in that field, you'll notice the Lock Field from Transfer item will also be checked.

Removing transfer locks

You can remove locks one field at a time, one form at a time or from an entire report at one time. At the same time WinTOTAL removes the lock, it also re-transfers information into the minor form.

- To remove a lock from one field: First click in the field. Then, click the lock button in the formatting bar.
- To remove all locks in a form, simply choose **Remove transfer locks from current form** from the **Form** menu.
- To remove all locks on all forms in the current report select, **Remove transfer locks from all forms** from the **Form** menu.

Once again, as you remove locks from fields, WinTOTAL will transfer information into the fields.

Manually applying transfers to forms

If you have turned off the transfers through the WinTOTAL configuration options, you may need to use this function to keep all your data consistent between forms, especially when cloning reports that had previous data in them. Simply choose the appropriate item from the **Form** menu to reapply all transfers to either the current form or all forms.

The lock button will appear pressed when the current field is locked from transfers.

Form PowerView

Note: Previous versions of WinTOTAL may have made it necessary to use the apply transfers function. You should find the use of this function rarely needed.

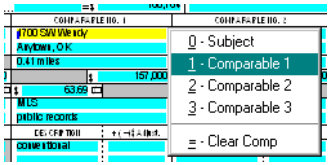
Additional Functions in the Form

Sales comps grid "=" functions

When in the Sales Comparison section of a form, WinTOTAL has several hot keys which let you copy data from one column to another. All of these hot keys are tied to the '=' key.

=0, =1, =2, =3, etc.	Copy information from the Subject field into the current comp field. Used in the first address field, it will copy the entire column. Use "0" for the subject.
== (Press "=" twice)	Used in the first field of a column, it clears all data and math from a comparable.

These hot keys work only on sales comps and are not available for rental comps or listings.



By pressing the "=" key in the first field of an item in the sales comparison section of any form, you get the option to copy an entry from another column. Press "=" in the address field and you can copy the entire

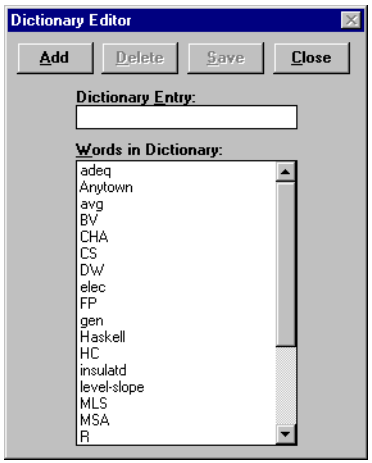
Spell Check

WinTOTAL's spell checker lets you spell check your entire report or just the form. You can also add words to the spell checker's dictionary.

- Click the **Spell** button in the toolbar to spell check the entire report or click the **Tools** menu and select **Check whole report**.
- To spell check the current form, click the Tools menu and select **Spell check** and then **Spell current form only**.
- You can check the current field individually by pressing ALT+S or clicking the **Tools** menu and selecting **Spell check** then **Check current field**.
- As you run the spell check, you are prompted to add unknown words to the dictionary associated with your user name. To add or remove words in the dictionary, click on **Edit**, select **Spell check** and then **View/Edit user dictionary**.

Misspelled Word Found
Not in Dictionary:
Anytown
Replace with:
Anytown
Suggestions:
Any town
Add to Dict
Stop
Replace
Replace All
Ignore
Ignore All
Simply indicate whether you want the word replaced, or if it's correct and should be added to your dictionary. Replace All will replace all occurrences of the word. You also can choose to ignore words that don't need to be added.

The first few times you run the spell checker, you'll need to teach it the common abbreviations and non-standard words you use frequently in reports.



Once words are in your dictionary, you can go to the dictionary editor to modify or edit them. Just click Tools then Spell check, then View/Edit User dictionary.

Recalculate form

WinTOTAL does math automatically when you press ENTER in a field, so this command isn't really necessary with normal usage. However, under

certain circumstances, like with converted files, you may need to retrigger all the math.

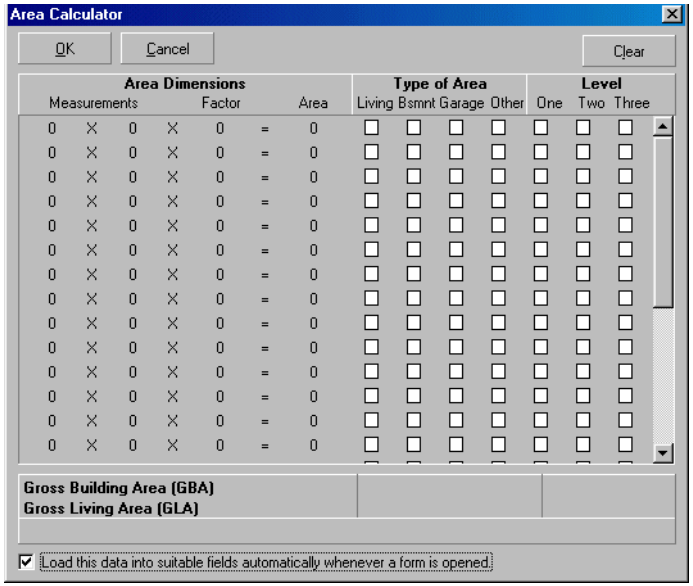
- Click the **Form** menu and choose **Recalculate current form**.
- This will redo all math as well as all intra-form transfers such as carrying data from the site section to the comps grid.

Area Calculator

If you don't use a sketch program to calculate areas, you have an interface for entering room dimensions in the Area calculator.

- To launch the Area Calculator, click the Tools menu and select Area Calculator.
- Type your figures in the appropriate fields, specifying the type and level of area calculating.
- Check the option to automatically transfer the figures if desired.
- When using the Building Area Addendum form, you must use the Area Calculator in order to enter figures onto the form.

WinTOTAL can only use figures from either the Area Calculator OR from your integrated sketcher; it cannot use both. WinTOTAL will always prompt for which one to use in the event you attempt to use both methods in a single report.



The Area Calculator is useful for people that don't use a sketch program to draw areas, but still need to calculate square feet.

Digital Signatures

You can scan your own digital signature

We provide the ASB compliant protection for "signed" reports. So you can use any standard image saved as a GIF, TIF, BMP, PCX or JPG. Using any off-the-shelf scanner, you can create digital signature for use with WinTOTAL. Or you may go to a local copy center that provides scanning services and have your signature scanned.

- Use 300 dpi at 100% size.
- We also recommend using either 256 colors, shades of gray or even "lineart" instead of 24-bit color.
- Make sure the background is white. You may have to adjust the brightness and contrast.

Every time you click the Sign button, you are told the status of the signatures on the report and subsequently given relevant options regarding the signatures.

- The GIF and PCX formats work the best. For a digital signature, we don't recommend JPG since it can be lower quality and blurred.
- Be sure to crop extra white space from the signature.

For a small fee, you can have us scan your signature for you. Call 1-800-ALAMODE for details.

Installing a pre-scanned signature

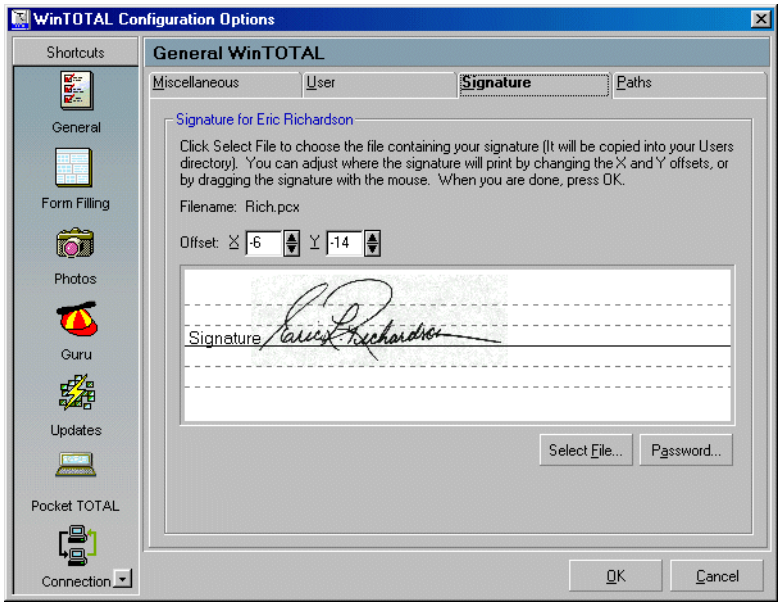
You must be logged into WinTOTAL as that user for whom you are setting up the signature.

1. To verify which user is logged into WinTOTAL, click the Tools menu, and choose **Configure**.
2. When the Options window appears, click on the **User** tab.
3. Once you have specified or verified the correct "current user" for WinTOTAL, you can then set up a digital signature for that user by going to the **Signature** tab.
4. To specify which signature file to use, you will need to click on **Select File**. You will be presented with the standard Windows Open dialog.
5. From the Open dialog, browse to the folder or drive where your signature is stored and double-click that file to select it. WinTOTAL will copy your signature from its original location to an internal directory.
6. You'll be taken back to the Signature setup dialog. If your signature isn't quite centered, you can "grab" it by clicking once on it and then drag it to a better position relative to the sample signature line. Every form has been aligned identically.
7. After you have centered your signature, you will want to assign a password to it. From the Signature setup dialog, click on **Password**.
8. For security, the password is never shown on your screen. WinTOTAL will prompt you for it twice to ensure you typed it right!

To sign a report with a digital signature

This should be the last thing you do before printing or EDI because the report will be locked.

1. Click the Sign button.

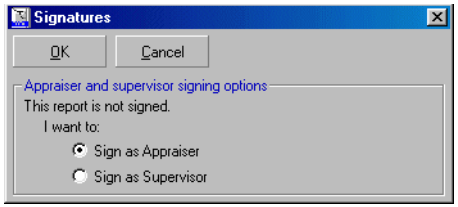


Remember to assign a password to your signature.

2. Choose to either sign as the Appraiser or as the Supervisor. Earlier versions of WinTOTAL required you to always sign as the appraiser first, but now you don't have to.
3. You will be prompted with a list of profiles that have signatures set up. Choose a name as well as in what color you want the signature to print and click OK.
4. If a password has been assigned to the signature, enter it and then click OK.

Clicking on **Sign** again will give you two options: **Sign as the Supervisor** or **Remove the Appraiser signature**.

- If you choose to sign as the supervisor, you simply pick the name and type the password. It's just like signing as the appraiser.
- You don't need a password to "unsign" a report, since a report without a signature is useless.
- After a report has been signed as the supervisor, clicking on Sign once again will give you the opportunity to remove the signatures.



Before a report is signed, you have options to apply an appraiser or supervisor signature. Once the report is signed, you also have options to remove all signatures.

More Chapters

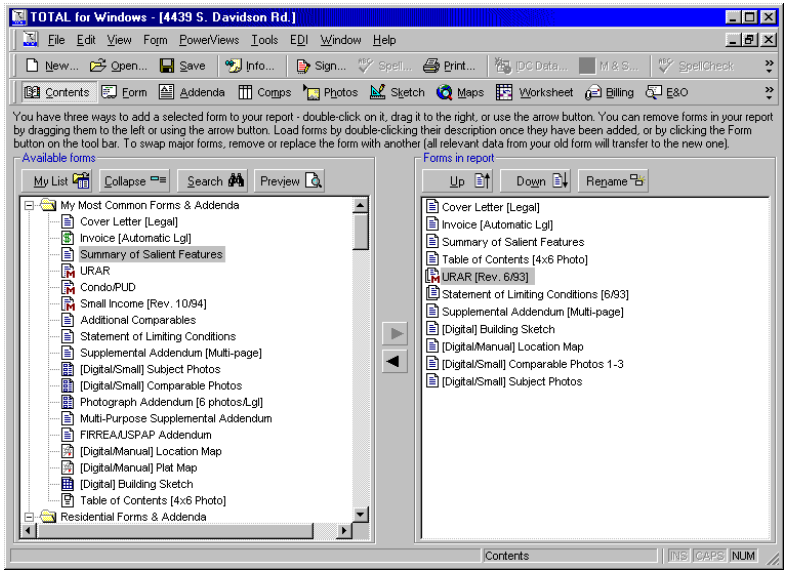
Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

Contents PowerView

Contents PowerView

The Contents PowerView is where you manage all of the forms in your WinTOTAL report. Since WinTOTAL gives you the ability to “clone” any report and use it as the basis for a new assignment, you essentially have an unlimited number of templates at your disposal. (We call them “skeletons”, “clones” or “boiler plates” sometimes, too.)

Templates can save you a lot of data entry by already having standard information in them. Many people create dedicated templates for different neighborhoods, clients and report types. Some people just use old reports for new assignments. It’s up to you.


TOTAL for Windows - [4439 S. Davidson Rd.]
File Edit View Form PowerViews Tools EDI Window Help
New... Open... Save Info... Sign... Print...
Contents Form Addenda Comps Photos Sketch Maps Worksheet Billing E&O
You have three ways to add a selected form to your report - double-click on it, drag it to the right, or use the arrow button. You can remove forms in your report by dragging them to the left or using the arrow button. Load forms by double-clicking their description once they have been added, or by clicking the Form button on the tool bar. To swap major forms, remove or replace the form with another (all relevant data from your old form will transfer to the new one).
Available forms
My List Collapse Search Preview
My Most Common Forms & Addenda
Cover Letter [Legal]
Invoice [Automatic Lgl]
Summary of Salient Features
URAR
Condo/PUD
Small Income [Rev. 10/94]
Additional Comparables
Statement of Limiting Conditions
Supplemental Addendum [Multi-page]
[Digital/Small] Subject Photos
[Digital/Small] Comparable Photos
Photograph Addendum [6 photos/Lgl]
Multi-Purpose Supplemental Addendum
FIRREA/USPAP Addendum
[Digital/Manual] Location Map
[Digital/Manual] Plat Map
[Digital] Building Sketch
Table of Contents [4x6 Photo]
Residential Forms & Addenda
Forms in report
Up Down Rename
Cover Letter [Legal]
Invoice [Automatic Lgl]
Summary of Salient Features
Table of Contents [4x6 Photo]
URAR [Rev. 6/93]
Statement of Limiting Conditions [6/93]
Supplemental Addendum [Multi-page]
[Digital] Building Sketch
[Digital/Manual] Location Map
[Digital/Small] Comparable Photos 1-3
[Digital/Small] Subject Photos
Contents
INS CAPS NUM

The Contents PowerView is where you manage the forms in your report. You can add, delete and rearrange forms in your report at any time.

Creating a template from scratch

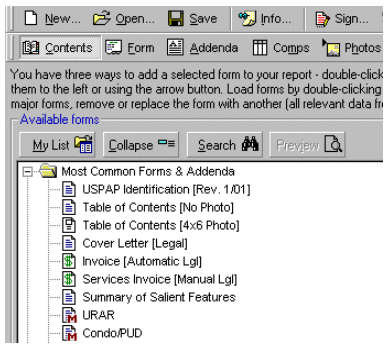
Here are the steps to create a template for a typical report “from scratch”. Keep in mind that after you create this report/template, you can just use the “Clone” feature in the “File Cabinet” to use it as the basis for a new assignment.

1. First, click on the folder in which you want to store the report. For this example, click on the "Tutorial Folder”.
2. Click on the “New” button near the top of the File Cabinet window.
3. This will start our Requester. Type your name followed by Tutorial Template into this screen. (ex: Matt's Tutorial Template)
4. After entering the template description, click on Open. In a moment, you'll see WinTOTAL's Contents PowerView feature start.

The forms list is split into different folders, based on the type of form.

- Most of the forms we're going to use are in the "Most Common Forms and Addenda" section of the forms list.
- You can “expand” and “collapse” a folder to hide or display its forms by double-clicking on the “+” sign that appears to the left side of the folder icon.
- To add a form, click it, then click the arrow pointing to the forms in your report. (You can also double-click the form to add it.)

In the next few steps, we'll step through building a new report.



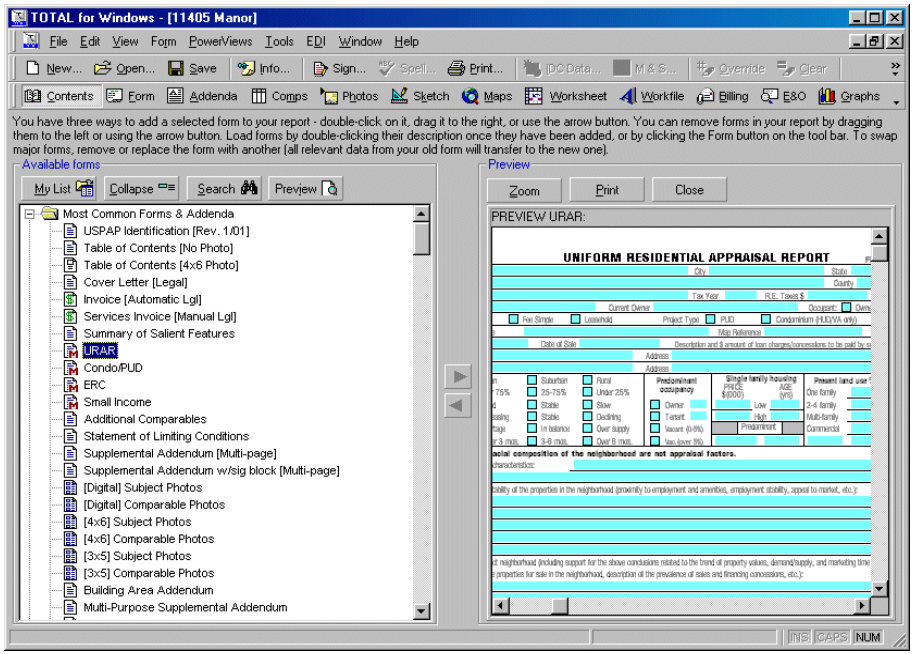
WinTOTAL’s forms list is sectioned off into folders to make forms easier to locate. The folders expand and collapse when you click on them so that your can hide sections of forms you may not use.

Contents PowerView

1. Click once on the third form in the list “Table of Contents [4X6] Photo”. Then click **Add**. You'll then see that form appear on the right side of the screen.
2. Double click the form named “Invoice [Automatic Lgl]”. You'll see it appear on the right, below the Table of Contents page.
3. Double click the “USPAP Identification” form, and you'll see it go in after the Invoice.
4. Click the **Preview** button to get a closer look at this form. You can use the **Zoom** function to see it in more detail. Or, click **Print** to generate a hard copy. Click **Close** when you are through.
5. Double click the “URAR” form to add it after the “USPAP Identification”.
6. Double click on the “Statement of Limiting Conditions”. (Are you getting the idea?)
7. Double click on the “Summary of Salient Features”.
8. Double click the Additional Comparables form. Notice when it is added to the forms list, it has “4-6” next to it automatically.
9. Double click the Multi-Purpose Supplemental Addendum.
10. Now use the scroll bar on the side of the forms list to make it scroll and reveal more forms.
11. Double-click the Subject Photo Page and add it.
12. Do the same with the Comparable Photo Page. When you add a Comparable Photo page to a report, WinTOTAL will ask you from which comps on the major form to merge data. In WinTOTAL's addenda, we try to automatically fill in as much data as we can from the major forms. It’s quite likely, you’ll never to actually preview photo pages on screen.
13. On the left side of the screen, double click Comparable Photo Page again. This time replace the number one with the number 4 because we want our second Comparable Photo Page to have data for comps 4, 5 and 6 next to the pictures.

Re-arranging forms in a report

We've now added a slew of forms to the report, and they need to be re-arranged to be in a more logical order.


TOTAL for Windows - [11405 Manor]
File Edit View Form PowerViews Tools EDI Window Help
New... Open... Save Info... Sign... Spell... Print... DC Data... M & S... Override Clear
Contents Form Addenda Comps Photos Sketch Maps Worksheet Workfile Billing E&O Graphs
You have three ways to add a selected form to your report - double-click on it, drag it to the right, or use the arrow button. You can remove forms in your report by dragging them to the left or using the arrow button. Load forms by double-clicking their description once they have been added, or by clicking the Form button on the tool bar. To swap major forms, remove or replace the form with another (all relevant data from your old form will transfer to the new one).
Available forms
My List Collapse Search Preview
Most Common Forms & Addenda
USPAP Identification [Rev. 1/01]
Table of Contents [No Photo]
Table of Contents [4x6 Photo]
Cover Letter [Legal]
Invoice [Automatic Lgl]
Services Invoice [Manual Lgl]
Summary of Salient Features
URAR
Condo/PUD
ERC
Small Income
Additional Comparables
Statement of Limiting Conditions
Supplemental Addendum [Multi-page]
Supplemental Addendum w/sig block [Multi-page]
[Digital] Subject Photos
[Digital] Comparable Photos
[4x6] Subject Photos
[4x6] Comparable Photos
[3x5] Subject Photos
[3x5] Comparable Photos
Building Area Addendum
Multi-Purpose Supplemental Addendum
Preview
Zoom Print Close
PREVIEW URAR:
UNIFORM RESIDENTIAL APPRAISAL REPORT
INS CAPS NUM

Use the Preview button to see forms before adding them to reports. From the Preview screen, you can even print a blank copy of the form without adding it to the report.

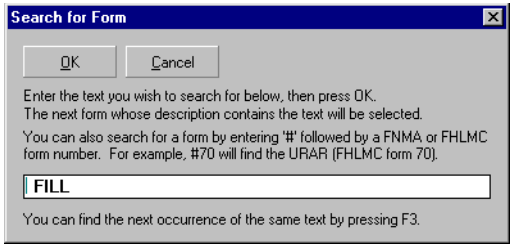
It's important that you use a SINGLE-CLICK the forms when re-arranging because double clicking on a form is a short-cut to loading the form.

1. First, let's move the Summary of Salient Features form to a spot right above the URAR. Click once on the Summary of Salient Features form now.
2. Click the Up arrow button twice (Another way of moving the form up or down is to click and hold down your left mouse button on the form that you are trying to move and then dragging the form to its proper location in the report).
3. Now, let's move the Statement of Limiting Conditions Page so that it is listed after the Additional Comparables. Just click once on the Statement of Limiting Conditions, and then click **Up**.
4. Let's continue to re-arrange the forms. Click on the Multi Purpose Supplemental Addendum once. Now, click on the Down arrow button three times to move it to the bottom of your report.

Those are the basics!

In reality, this template we created is no different than any other report in WinTOTAL. Follow these steps to create more templates for different neighborhood lenders or situations - perhaps even cloning the one we just did to make the task a little easier. Here are some additional tips:

- The Contents PowerView lets you jump between forms just as the “Jump to Other Forms” item in the Form PowerView.
- If you want to put some default information in this “template”, just go to the Form PowerView and type it in.
- Forms can be added or deleted to this report template at any time. Just go back to the Contents PowerView. Add forms as we did previously, or remove them by highlighting the form in the report and clicking the arrow pointing back to the main list.


Search for Form
OK
Cancel
Enter the text you wish to search for below, then press OK.
The next form whose description contains the text will be selected.
You can also search for a form by entering '#' followed by a FNMA or FHLMC form number. For example, #70 will find the URAR (FHLMC form 70).
FILL
You can find the next occurrence of the same text by pressing F3.

Use the Search button to locate forms in the list of available forms. You only have to type in part of the form description or the FNMA number preceded by the # symbol.

Filler pages for non-WinTOTAL forms

Occasionally, you may have to use forms in a report that don't print from WinTOTAL. How do you make these forms appear in your printed Table of Contents? The answer is to use "filler pages". With filler pages, you can add entries into your table of contents and have WinTOTAL reserve a page number for those pages. The pages you insert manually may not

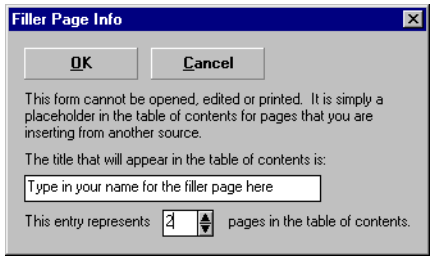
have page numbers on them, but in case they are between two pages that do, you can make WinTOTAL skip a number between its pages. Here's how you can use filler pages in the current report we are setting up:

1. First, let's find the filler page. Click on the Search button above the "Available Forms" dialog.
2. Enter the word **FILL** in the field and click OK. WinTOTAL will skip down to the portion of the forms list that has the filler page.
3. Double click the Filler Page to add it to your current report. You will be presented with a dialog asking you how you want that page listed. For this tutorial, enter Repairs Costs Addendum. Then, click OK. You will then see this page added to the end of your report.

Now, what if you have to insert a multi-page form into your report. Here is an example of how to do that. In the same report, we are going to add an additional Filler Page to represent a resume.

1. Double click the Filler Page again to add another one to your current report. You will be again presented with a dialog asking you how you want that page listed. For this tutorial, enter "Blueprints".
2. Note the field at the bottom of the dialog, prompting for the number of pages to reserve. Replace the number one with the number two.
3. Then, click OK. Your appraisal report should now have another form added to the bottom.

It's important to have every page in your report accounted for in the Table of Contents. Filler pages are a great way of doing that. To include items in your report that you don't necessarily want printed or in your table of contents, see our ***"USPAP Compliance in the Digital Domain"*** chapter.


Filler Page Info
OK
Cancel
This form cannot be opened, edited or printed. It is simply a placeholder in the table of contents for pages that you are inserting from another source.
The title that will appear in the table of contents is:
Type in your name for the filler page here
This entry represents
2
pages in the table of contents.

Filler pages are useful when accounting for pages in your report that weren't generated with WinTOTAL. Nothing prints for the filler page, they are simply a placeholder and title that goes in the table of contents. They cause WinTOTAL to skip page numbers in forms so you can insert extra documents.

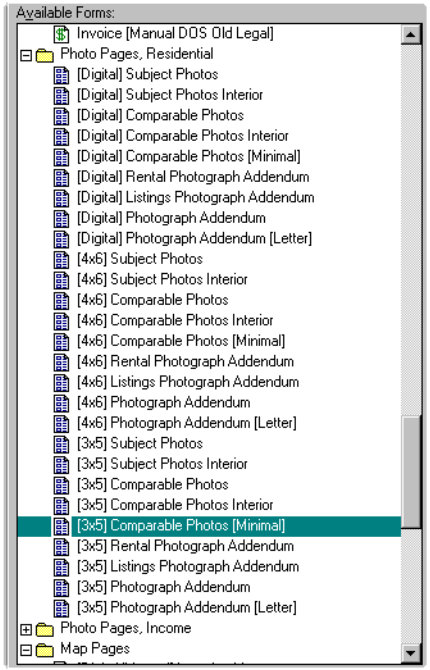
Special use forms

There are several forms we've designed that we'd like to point out. Remember, you can locate any of these by using the Search feature.

- **Services Invoice [Manual].** In case you don't use our automatic billing system, you can use one of our manual invoice forms. The [automatic] forms are designed to pull information from our office manager database and will not hold entries manually typed.

Contents PowerView

- **[Digital] photo pages.** Previous versions had [Digital], [3X5] and [4X6] photo pages - all for use with digital photos. We now have [Small], [Medium] and [Large] photo pages since images from digital cameras are not really shaped like those from film. These forms also scale the pictures based on width so that images from different cameras will appear proportional when printed. [Manual] photo pages do not accept digital photos and have boxes for framing film prints.
- **[Minimal] photo pages.** These carry only the address and none of the property data like the other forms. This is useful when a major form does not have certain elements on our default photo pages. Just click **Search** and type **Minimal** to locate them in the list.
- **[Manual] Building Sketch.** This is graph paper in case you don't use an electronic sketching program
- **[Scanned page] Addendum.** These are blank forms on which you can scan whatever you like into the single page-size image area. See our chapter on the ***"Photos PowerView"*** for details.



WinTOTAL contains a wide variety of photo pages and additional forms for you to use in your reports. Just scroll through the list to get ideas for forms to use.

More functions in the Contents PowerView

Changing the major form type

If a report was started using one major form, such as the 2005, and needs to be switched midstream to a URAR, you can do it - without losing data - here in the Contents PowerView. Find the new major form you want and add it into the report. WinTOTAL will detect there is already a major form and prompt you to replace the existing major form with the new one.

Searching for forms

Browsing through our extensive forms library isn't always convenient. To find a particular form, try our Search function.

1. Type just a portion of the name, such as **HUD**, or **VA**. If you know the form number, enter it preceded with a **#** symbol instead; for example, **#1004** or **#442**. You don't need to type the whole name. (Typing too restrictive of criteria can cause a form to not be found.) Click OK.
2. The first instance of the matching phrase will be highlighted. If it isn't the form you need, press F3 and the next instance will be found.
3. Once you find a form, you can preview or add it to your report.

Contents PowerView

Multiples and renaming forms

Another handy feature is the ability to add multiples of the same form into your report - especially with addenda forms.

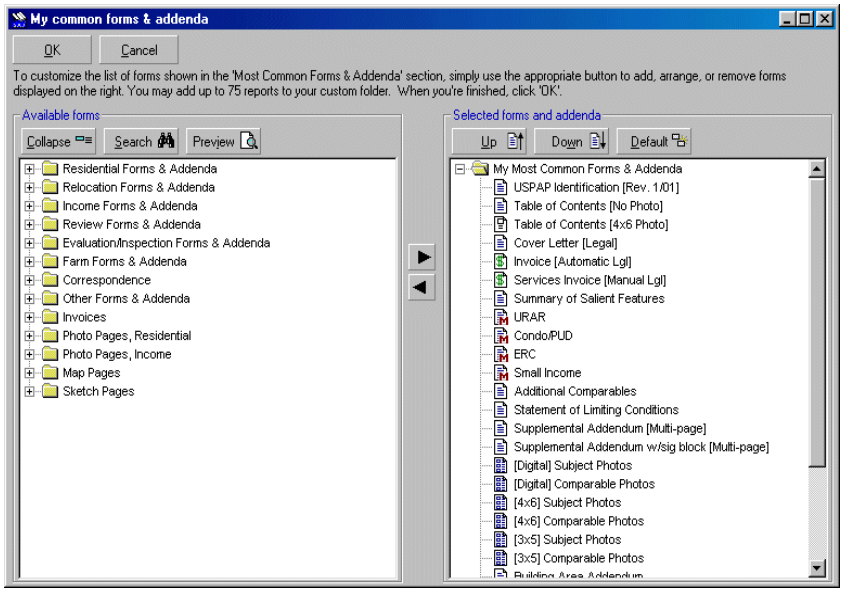
- When adding forms to your report, just double-click on the same form and it will be added again.
- After a form is added, click on it in the list of “Forms in report”, then click **Rename**. Here, you can enter a different description of the form for the printed table of contents. Renaming the form here doesn’t necessarily change the header on the form itself. For that, you’ll need to jump to the form and type in its header.

Customizing “My Most Common Forms and Addenda”

Since there are so many forms in WinTOTAL, we made this list to facilitate access to those that are the most widely used. While in the Contents PowerView, click the **My List** button.

- Use the arrow button pointing to your list to add the currently selected form to your most common forms list on the right. Similarly, use the arrow pointing back to the whole list to take forms out of the list that aren’t really your “most common”. Double-clicking forms will also add or remove them from your list.
- The **Up/Down** buttons are for customizing the list order.
- The **Default** button lets you set the list back to the way it was when you first installed WinTOTAL.

Remember, this list is a subset of the whole forms list in WinTOTAL. Just because you take a form out of this list doesn’t mean you can’t use it. It just means that you may have to hunt through the different categories of forms or use the search feature.



When in the Contents PowerView, you can click the “My Forms” button and change the forms listed in the Most Common Forms and Addenda category.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL’s Help menu. You can also find more tutorials on all of WinTOTAL’s PowerViews. The more you know about the software, the more efficient and competitive you can be.

Addenda PowerView

Addenda PowerView

Powerful and flexible addenda features

The Addenda PowerView is where you enter extended comments and create formatted addenda. You can get to it in three ways:

- WinTOTAL automatically splits the screen between your form and addenda when you type too much information into a field. This also ties the comments you then type to the field on the form.
- You can click on the Addenda PowerView. This won't link the current field to the addenda. Instead, it just places your cursor at the end of the addendum text.
- Jump to an addendum form by clicking on the Jump to Other Forms button. This will launch your addendum in full screen mode.

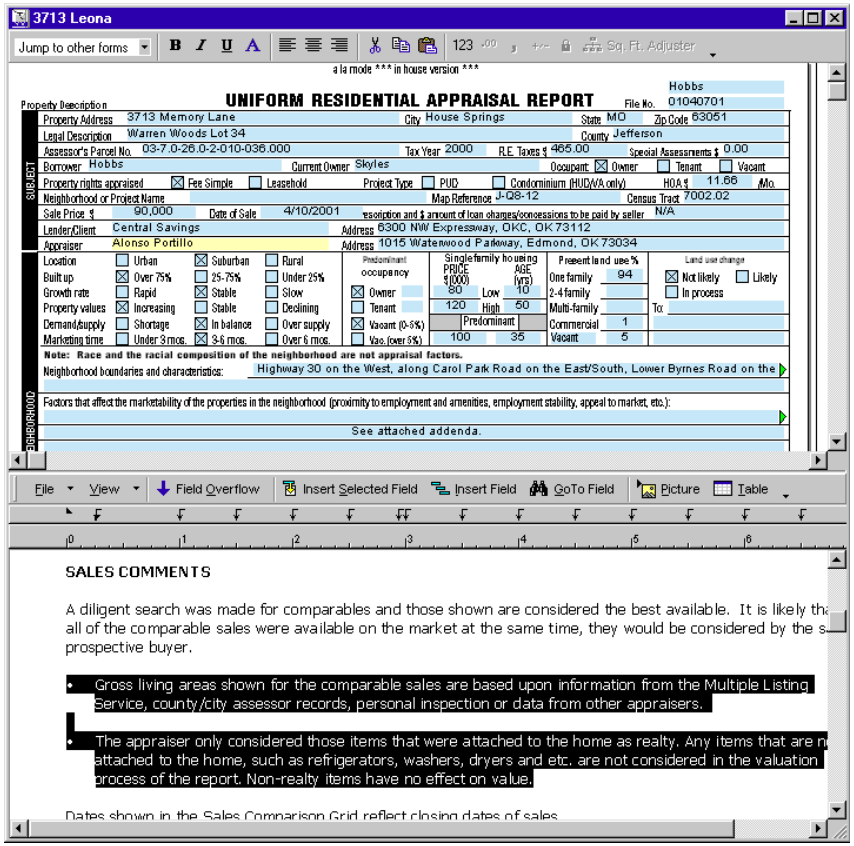
When in split screen mode, you may switch back to editing the appraisal form in full screen mode by clicking on the Form PowerView. Split screen mode also offers some other features as we'll see in this chapter.

Using Addenda Forms

Two types of addenda forms

There are two types of additional comments pages in WinTOTAL:

- The "multi-page" addenda forms that have a white background and act like a word processor are the preferred forms. Examples of these forms are the Supplemental Addendum [Multi-page] and the addenda pages that are created by WinTOTAL when you type more information than will fit in a field. The usage of these types of forms is the subject of this chapter.
- Other addenda forms in WinTOTAL, such as the Supplemental Addendum [Single Page] found in the "Other forms and addenda" section of the Contents PowerView, are actually a form with one long data entry field. These forms are identified by having individual lines visible as a field. The usage of these forms is discouraged. They date back to early versions of TOTAL that didn't have advanced word processing features.


3713 Leona
Jump to other forms
UNIFORM RESIDENTIAL APPRAISAL REPORT
Property Address 3713 Memory Lane
City House Springs
Legal Description Warren Woods Lot 34
Assessor's Parcel No. 03-7.0-26.0-2-010-036.000
Borrower Hobbs
Current Owner Skyles
Sale Price $ 90,000
Date of Sale 4/10/2001
Lender/Client Central Savings
Address 6300 NW Expressway, OKC, OK 73112
Appraiser Alonso Portillo
Address 1015 Waterwood Parkway, Edmond, OK 73034
Neighborhood boundaries and characteristics: Highway 30 on the West, along Carol Park Road on the East/South, Lower Byrnes Road on the
See attached addenda.
File View Field Overflow Insert Selected Field Insert Field GoTo Field Picture Table
SALES COMMENTS
A diligent search was made for comparables and those shown are considered the best available. It is likely th
all of the comparable sales were available on the market at the same time, they would be considered by the s
prospective buyer.
Gross living areas shown for the comparable sales are based upon information from the Multiple Listing Service, county/city assessor records, personal inspection or data from other appraisers.
The appraiser only considered those items that were attached to the home as realty. Any items that are n
attached to the home, such as refrigerators, washers, dryers and etc. are not considered in the valuation process of the report. Non-realty items have no effect on value.
Dates shown in the Sales Comparison Grid reflect closing dates of sales

WinTOTAL's new Addenda PowerView gives you more flexibility than ever when it comes to making professional looking, formatted addenda.

Addenda PowerView

Add forms through the Contents PowerView

WinTOTAL lets you add multiple instances of the same form into your reports. This feature is useful for addenda forms. You can add separate addenda style forms for different types of comments or your resume or "homemade" forms. Once the forms are added, you can rename them so they appear differently in the table of contents and you can also change the heading.

1. Click the Contents PowerView.
2. Under Most Common Forms and Addenda, double click the Supplemental Addendum [Multi-Page] form to your report.
3. Click on it after it appears in the list on the right. The rename button should be enabled.
4. Click on the Rename button and you can change the form's description.
5. You'll still need to jump to that form later and change the header if you want it to be different from other addenda forms you've added to your report.

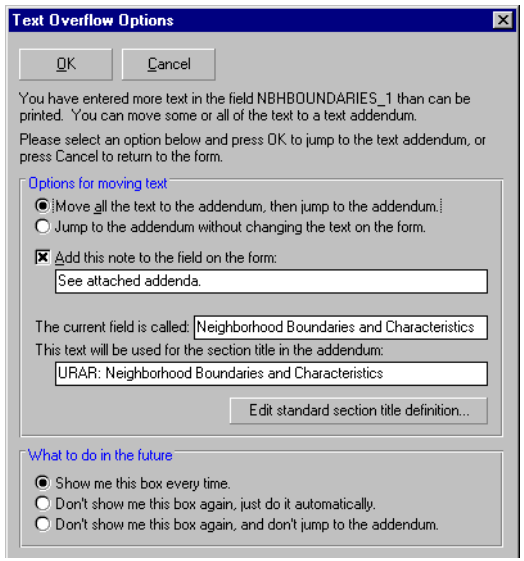
When jumping automatically to addenda forms, WinTOTAL uses the first one in the list.

Automatic Overflow

Text addenda linked to your forms

When you enter more information than can fit in a comment field, WinTOTAL automatically switches you to the Addenda PowerView.

- You can either move the text to the addendum or jump to the addendum leaving your partial comment on the form.
- A comment such as "See attached addenda." may be inserted in the current field. This item can be modified by typing in the "Add this note to the form" field.
- Each field is also named and given a heading in the addenda. This gives your extended comments a more professional look and adds to readability. You can change the default heading by simply in a different name for the field. The next section discusses changing the format of this option.


Text Overflow Options
OK
Cancel
You have entered more text in the field NBHBOUNDARIES_1 than can be printed. You can move some or all of the text to a text addendum.
Please select an option below and press OK to jump to the text addendum, or press Cancel to return to the form.
Options for moving text
Move all the text to the addendum, then jump to the addendum.
Jump to the addendum without changing the text on the form.
Add this note to the field on the form:
See attached addenda.
The current field is called: Neighborhood Boundaries and Characteristics
This text will be used for the section title in the addendum:
URAR: Neighborhood Boundaries and Characteristics
Edit standard section title definition...
What to do in the future
Show me this box every time.
Don't show me this box again, just do it automatically.
Don't show me this box again, and don't jump to the addendum.

Before jumping to the Addenda PowerView, you're given several options regarding how text should be moved to the addenda and an automatic heading for the addenda form.

- The automatic headings that are created keep track of which field the block of text is tied When using the automatic text overflow, enter you comments below the automatic heading.

WinTOTAL remembers any changes you make to the defaults and automatically applies them in the future.

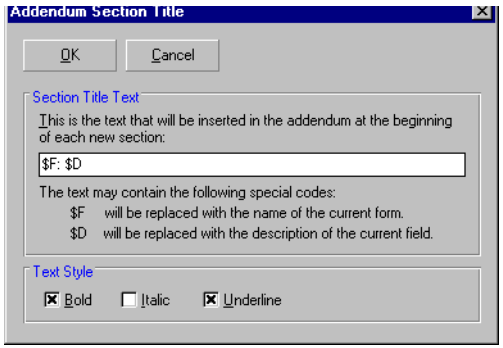
Changing the default section title

By default, WinTOTAL assigns a heading consisting of the form name and the field description. As mentioned before, you can type in a new name for the field and it will be used automatically in the future.

1. When in the Addenda PowerView, click Field Overflow.
2. Then click the Edit standard section title definition button. You can then see how WinTOTAL generates these titles.

- The $F variable means use the name of the form.
- The $D variable means insert the field description.

3. You can remove either or both of these so that they don't appear, but we don't recommend it.


Addendum Section Title
OK
Cancel
Section Title Text
This is the text that will be inserted in the addendum at the beginning of each new section:
$F: $D
The text may contain the following special codes:
$F will be replaced with the name of the current form.
$D will be replaced with the description of the current field.
Text Style
Bold
Italic
Underline

Here, you can change the default section title that gets placed on your addenda forms.

Word Processing Features

Changing your view

The Addenda in WinTOTAL has several options under its View menu to assist you as you work up your document.

- Normal view gives you more room on screen to type while the Print Preview shows you what the document will like when printed.
- Depending on your preference, you can turn the ruler on and off. The ruler may come in handy while you are building tables.

Think of viewing the Page Header as seeing your "master page". It is basically the shell around the word processing part of the page. To modify the information that appears at the top of the addenda printouts:

1. Click Show Page Header when in the Addenda PowerView
2. The form part of the screen will switch to a page that is blank, except for the header and, in some cases where there is a signature line on the addenda, a footer if you scroll down.
3. Just as in a regular form, type in the fields to make changes.

Changing font style

The addenda doesn't have the same limitations with fonts as your forms do: To change text appearance in the Addenda PowerView:

1. Select the text first by clicking and dragging your mouse over it.
2. Click the Fonts button (it looks like an A) on the formatting bar.
3. Make your change in the fonts dialog and click OK.

You'll see your selected text become affected by the change. Similarly, text appearance can be customized by right-clicking the selected text and choosing a formatting option from the fly-out menu.

Tab stops

Tab stops are as in a typewriter's. They help you evenly space things on screen. Instead of using consecutive spaces, use a TAB to move your text for a very professional look. To set your tab stops, do the following:

1. Activate your ruler by clicking the Addenda PowerView's View menu and choosing ruler.
2. Click in the paragraph or highlight the paragraphs where you want to modify the tabs.
3. Above the ruler are arrows pointing down that indicate where tabs currently are.

- To move a tab stop, click and drag it.
- To remove a tab stop, click and drag it off the ruler.

That's all there is to it. The example on the first page shows tab stops at 1/4 inch.

Paragraph settings

You can give your document a more professional appearance by indenting sections and using paragraph formatting.

1. Click in the paragraph you wish to change.
2. Click the Paragraph button on the formatting toolbar.
3. Set your options for indents and line spacing and click OK. Note that the first character/digit must be numeric and not a decimal point.

Click and drag the arrows to move your tab stops in the Addenda PowerView.

Use the paragraph button to set indents and other formatting.

Addenda PowerView

Create bullets and hanging indent

Here is how you create bullets and a “hanging” indent as shown on page one of the manual.

1. Type the list of items you want in your list.
2. Highlight the list by clicking and dragging.
3. Click the bullets button in the toolbar below WinTOTAL’s menus at the top of the screen.

Inserting an image

WinTOTAL also gives you the ability to have images inside your addenda. This could come in handy if you were inserting a logo or a small graphic. **Simply click the Image button and choose the file that contains the picture.**

Once an image has been inserted, you can resize it by double-clicking it and adjusting the scale via the onscreen slide control.

Copy and paste from Microsoft Word 2000

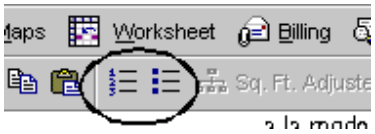
WinTOTAL’s addenda supports more formatting than it actually grants access to through its functions. We included a limited set of formatting and features to keep it simple and match the needs of most appraisal practices’ addenda habits.

Dedicated word processors like Microsoft Word give you full access to a wide variety of features to help your documentation. If you prefer to use a word processor, you can always copy and paste your work into WinTOTAL - our Addenda PowerView will keep most of the commonly used formatting commands and render your document properly.

Linking in fields from forms

A new feature in our Addenda PowerView is the ability to place hot links to fields from your appraisal forms. This is useful for making boilerplate addenda such as the cover letter that automatically has the address, value or other information. Here’s how it works.

1. Open a report and go to the Addenda PowerView
2. Since you’re in split screen mode, you should be able to see the form and the addenda.
3. Click in the addenda where you want that fields contents inserted.



Use the bullets and numbering items below Wir TOTAL’s PowerView buttons in the Addenda PowerView.

4. Now, click a field in the form that you want in the addenda.
5. Then, click **Insert Selected Field**. We'll talk about the other "Insert Field" button in a moment.

You'll see the field from the form transfer into the addenda. To demonstrate that it is a live link, change the field on the form and watch it change the addenda when your cursor leaves the field! You can link fields from multiple forms in the report, too.

If you don't like scrolling around your forms in the split screen view, we have an easy way for you to insert fields from your report's major form. Instead of steps 4 and 5 above, do the following:

1. Click **Insert Field**.
2. A menu will appear with the form's major sections. Click the section.
3. Then, fields from that section will be listed alphabetically. The arrow at the bottom of the list is for you to scroll. Click the field from that list and it will be inserted into your addenda.

Saving and loading addenda templates

With the powerful formatting and ability to link live fields, it is likely you will build up a library of addenda to reuse. Quite often, these may be in the reports you clone. But, but you can also store them separately in case the addenda isn't in the file you're cloning.

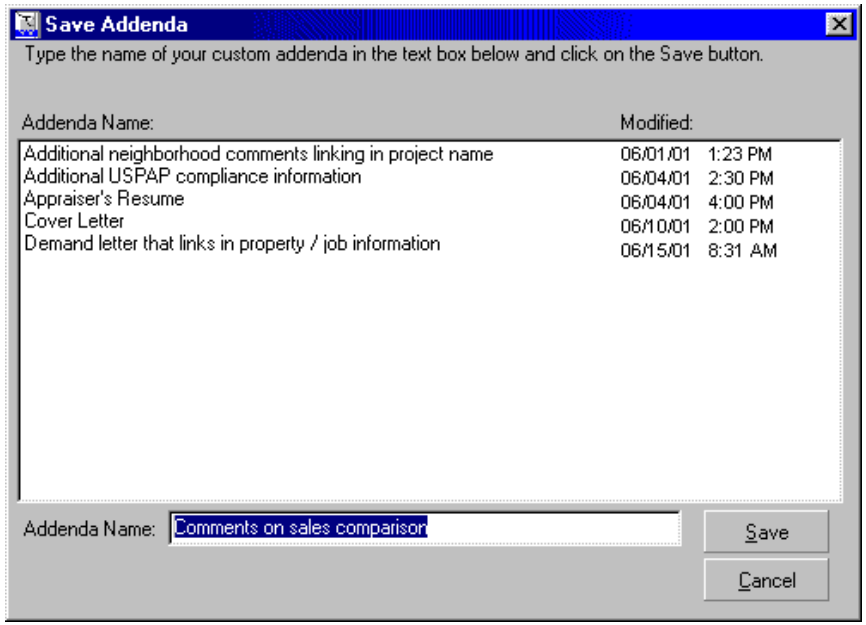
1. Once you have the addenda "finished", click the File drop down in the Addenda PowerViews lower toolbar. (Don't click the File menu at the top of the screen in other words.)
2. Click Save if you have never saved this particular addenda. Or, click Save As if this is a modification of a previously saved addenda.
3. Give the Addenda a name so you can identify it and click Save.

Working with tables

Inserting a table

Tables are handy for showing structured lists or creating columns.

1. Click the Table menu and choose Insert Table.
2. Specify the number of rows and columns. Note there is not any way to change the rows and columns for the table once it is inserted


Save Addenda
Type the name of your custom addenda in the text box below and click on the Save button.
Addenda Name:
Modified:
Additional neighborhood comments linking in project name 06/01/01 1:23 PM
Additional USPAP compliance information 06/04/01 2:30 PM
Appraiser's Resume 06/04/01 4:00 PM
Cover Letter 06/10/01 2:00 PM
Demand letter that links in property / job information 06/15/01 8:31 AM
Addenda Name:
Comments on sales comparison
Save
Cancel

Save and reload addenda you have already formatted. This keeps you from having to put them in all of your templates.

3. Click OK.

Table and cell formatting

Once the table is inserted, you can customize its look.

1. While your cursor is in the table, click the Table menu again.
2. Choose Table Attributes.
3. Then, specify how thick the borders are, what color the background is and how much padding is between the text and borders.

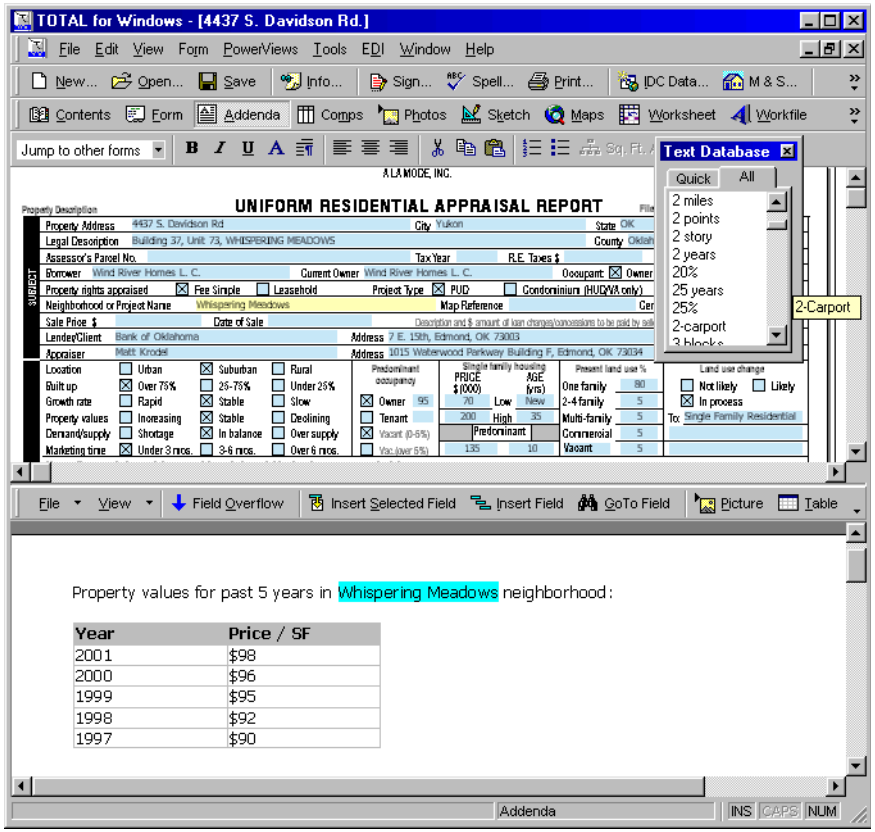
You can also customize individual cells with colors borders and space from other objects.

1. Put your cursor in a cell to customize.
2. Click the Table menu.
3. Choose cell properties.

Notice that customizations can be applied to an individual, a whole column or row, or the whole table.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.



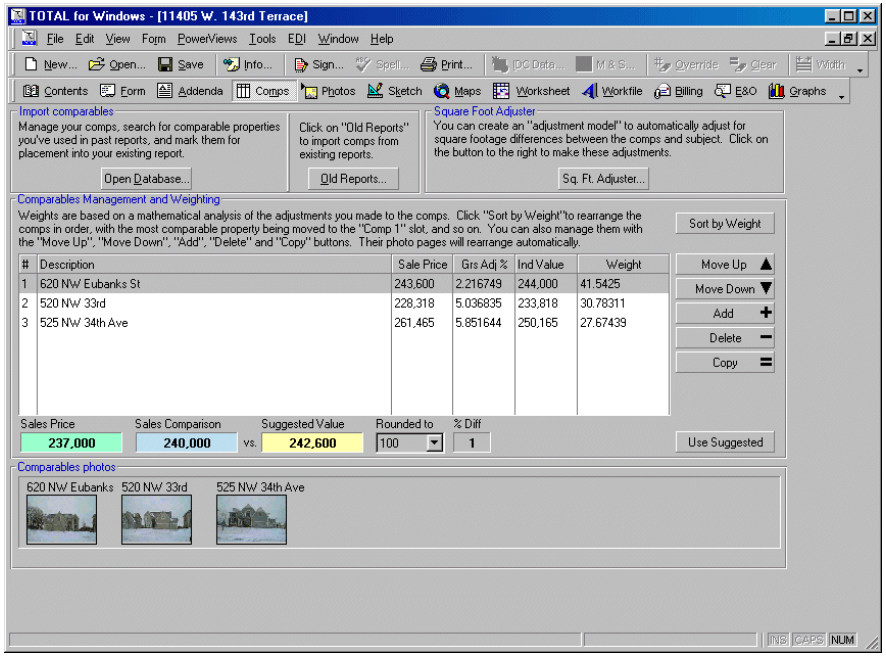
Tables may be used for formatting charts and comparisons as well as providing extra formatting for lists and columns.

Comps PowerView

Comps PowerView

This chapter describes the WinTOTAL Comps PowerView. This document assumes you have already installed WinTOTAL and are familiar with operations regarding building and entering data into reports. The chapter is broken up into the following sections:

- ***Tools in the Comps PowerView***. Here we cover merging comparables from existing reports, using the square footage adjustment tool and sorting comparables
- ***Batch Import to Build Your Comps Database*****.** A great way to get started with the Comparables Database.
- ***Adding and Removing Properties*****.** Here we cover creating a database from existing reports, editing comp data, deleting comparables, and placing comparables from the database into your reports.
- ***Date and Age Field Formatting***. This discusses how the database interprets your date and numeric entries.
- ***Searching using the Intelligent Query*****.** Learn how to search through your database with just a few clicks.
- ***Printing Comps Database Reports***. The Comparables Database has a reporting function that creates hard copies and exports data.
- ***Customizing the Database View*****.** Sort and customize the columns.


TOTAL for Windows - [11405 W. 143rd Terrace]
File Edit View Form PowerViews Tools EDI Window Help
New... Open... Save Info... Sign... Spell... Print... DC Data... M & S... Override Clear Width
Contents Form Addenda Comps Photos Sketch Maps Worksheet Workfile Billing E&O Graphs
Import comparables
Manage your comps, search for comparable properties you've used in past reports, and mark them for placement into your existing report.
Open Database...
Click on "Old Reports" to import comps from existing reports.
Old Reports...
Square Foot Adjuster
You can create an "adjustment model" to automatically adjust for square footage differences between the comps and subject. Click on the button to the right to make these adjustments.
Sq. Ft. Adjuster...
Comparables Management and Weighting
Weights are based on a mathematical analysis of the adjustments you made to the comps. Click "Sort by Weight"to rearrange the comps in order, with the most comparable property being moved to the "Comp 1" slot, and so on. You can also manage them with the "Move Up", "Move Down", "Add", "Delete" and "Copy" buttons. Their photo pages will rearrange automatically.
Sort by Weight
Description Sale Price Grs Adj % Ind Value Weight
1 620 NW Eubanks St 243,600 2.216749 244,000 41.5425
2 520 NW 33rd 228,318 5.036835 233,818 30.78311
3 525 NW 34th Ave 261,465 5.851644 250,165 27.67439
Move Up
Move Down
Add
Delete
Copy
Sales Price 237,000
Sales Comparison 240,000
vs.
Suggested Value 242,600
Rounded to 100
% Diff 1
Use Suggested
Comparables photos
620 NW Eubanks
520 NW 33rd
525 NW 34th Ave

The Comps PowerView has all comps functions organized into one easy screen.

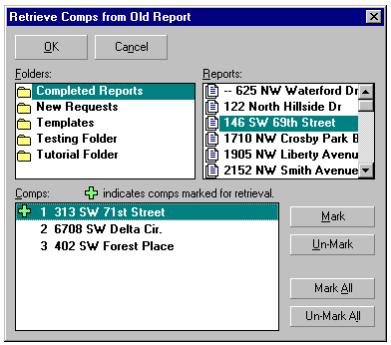
Tools in the Comps PowerView

Accessing comparables in existing reports

If you know of a specific report that has a comp in it you wish to use, you can easily pull it into your current report.

1. From the Comps PowerView, click on the **Old Reports** button.
2. Browse the folders until you find the report with the comparables.
3. When you click on the report, it will show you the comparables in it.
4. To import comparable one from the sample, just double-click on it.
5. Then click OK.

Notice that the comparable from the sample is now listed on the Comps PowerView with photos.



You can merge in comparables from existing reports by clicking on Old reports button in the Comps PowerView.

Comps PowerView

The integrated Comparables Database allows you to search for comparables based on criteria you specify. It is discussed on page 7.

Square footage adjustments

The Square Footage Adjustment Calculator allows you to easily adjust for differences in the square footage of all comparables in one easy step.

1. Ensure that the sales price and square footage for all comparables have been entered.
2. In the Comps PowerView, click on the **Sq. Ft. Adjuster** button.
3. The first section of the Square Footage Adjustment Calculator shows you the methods available for calculating the adjustment. Their meaning is self-evident.
4. As you choose the method and set the parameters that determine if the adjustment is relevant, the SF Adjuster shows you the resultant net/gross percentage as it will appear on the form.
5. Click OK to merge the adjustment figures into the current report.

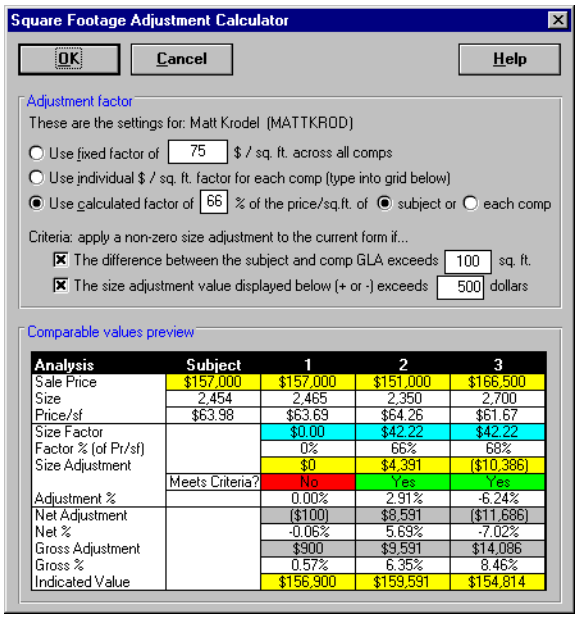
If for some reason, you must change the square footage of a comparable, be sure to reload the SF Adjuster so that it can re-trigger the math.

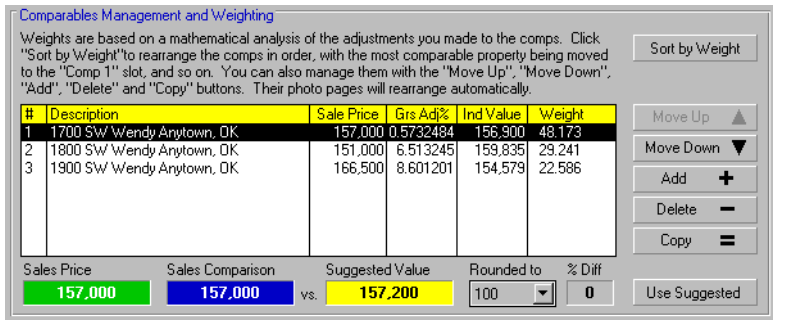
Copying, swapping and rearranging comparables

In the comparables listing, you can now see comparables with gross adjustments, indicated value and a relative weight that corresponds to the comparability of each property.

- WinTOTAL uses the weighted average to suggest a value. Click the **Use Suggested** button if you wish to put that value into your report.
- The Sort by weight button sorts the comps by their relative weight.
- The **Move Up** and **Move Down** buttons will swap the highlighted comp with the one above or below it respectively.
- The **Add** button inserts a blank comp below the highlighted comp.
- The **Delete** button deletes the currently highlighted comparable and moves the other comparables up one position.
- The **Copy** button copies the selected comparable to the next slot and pushes the others down one position.

The Square Footage Adjustment tool enables you to adjust all comparables at one time and apply logic to your square footage adjustments.


Square Footage Adjustment Calculator
OK
Cancel
Help
Adjustment factor
These are the settings for: Matt Krodel (MATTKROD)
Use fixed factor of 75 $ / sq. ft. across all comps
Use individual $ / sq. ft. factor for each comp (type into grid below)
Use calculated factor of 66 % of the price/sq.ft. of subject or each comp
Criteria: apply a non-zero size adjustment to the current form if...
The difference between the subject and comp GLA exceeds 100 sq. ft.
The size adjustment value displayed below (+ or -) exceeds 500 dollars
Comparable values preview
Analysis | Subject | 1 | 2 | 3
Sale Price | $157,000 | $157,000 | $151,000 | $166,500
Size | 2,454 | 2,465 | 2,350 | 2,700
Price/sf | $63.98 | $63.69 | $64.26 | $61.67
Size Factor | | $0.00 | $42.22 | $42.22
Factor % (of Pr/sf) | | 0% | 66% | 68%
Size Adjustment | | $0 | $4,391 | ($10,386)
Meets Criteria? | | No | Yes | Yes
Adjustment % | | 0.00% | 2.91% | -6.24%
Net Adjustment | | ($100) | $8,591 | ($11,686)
Net % | | -0.06% | 5.69% | -7.02%
Gross Adjustment | | $900 | $9,591 | $14,086
Gross % | | 0.57% | 6.35% | 8.46%
Indicated Value | | $156,900 | $159,591 | $154,814

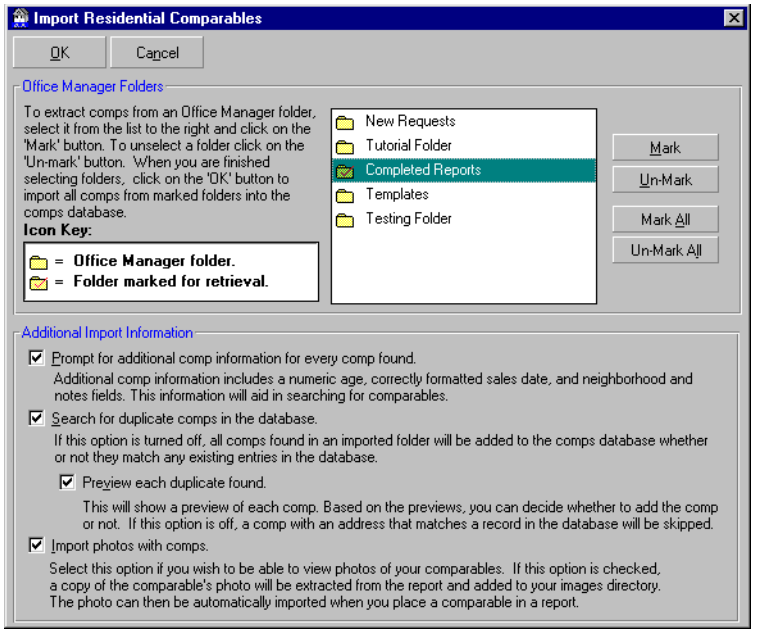

Comparables Management and Weighting
Weights are based on a mathematical analysis of the adjustments you made to the comps. Click "Sort by Weight"to rearrange the comps in order, with the most comparable property being moved to the "Comp 1" slot, and so on. You can also manage them with the "Move Up", "Move Down", "Add", "Delete" and "Copy" buttons. Their photo pages will rearrange automatically.
Sort by Weight
| Description | Sale Price | Grs Adj% | Ind Value | Weight
1 | 1700 SW Wendy Anytown, OK | 157,000 | 0.5732484 | 156,900 | 48.173
2 | 1800 SW Wendy Anytown, OK | 151,000 | 6.513245 | 159,835 | 29.241
3 | 1900 SW Wendy Anytown, OK | 166,500 | 8.601201 | 154,579 | 22.586
Move Up
Move Down
Add
Delete
Copy
Sales Price
157,000
Sales Comparison
157,000
vs.
Suggested Value
157,200
Rounded to
100
% Diff
0
Use Suggested

The Comparable Management and Weighting section of the WinTOTAL Comps PowerView is where you may copy and swap comparables. Our exclusive weighting algorithm even suggests a value for you.

Batch Import to Build Your Comps Database

If you've been using WinTOTAL for a while and have a library of reports, you can create a database out of the properties in their market sections, regardless of what major form was used. You can also catalog the images used for each property in the database.

1. Go to the Comps PowerView and click **Open Database**.
2. Click on the **Import** button.
3. Now, mark the folders from which you want to import the comparable and subject property data. To mark a folder, just double click on it.
4. Review and select options regarding verification of items such as date fields and how to handle duplicates when found. For sale date and age entries, WinTOTAL stores two items -- one formatted for searching or sorting and another for placement in the form. This import utility will try to discern properly formatted dates and numerical ages from the information you entered in the appraisal, but success is not guaranteed. therefore, it prompts you for the data.
5. Click on OK to begin the import.


Import Residential Comparables
OK
Cancel
Office Manager Folders
To extract comps from an Office Manager folder, select it from the list to the right and click on the 'Mark' button. To unselect a folder click on the 'Un-mark' button. When you are finished selecting folders, click on the 'OK' button to import all comps from marked folders into the comps database.
Icon Key:
= Office Manager folder.
= Folder marked for retrieval.
New Requests
Tutorial Folder
Completed Reports
Templates
Testing Folder
Mark
Un-Mark
Mark All
Un-Mark All
Additional Import Information
Prompt for additional comp information for every comp found.
Additional comp information includes a numeric age, correctly formatted sales date, and neighborhood and notes fields. This information will aid in searching for comparables.
Search for duplicate comps in the database.
If this option is turned off, all comps found in an imported folder will be added to the comps database whether or not they match any existing entries in the database.
Preview each duplicate found.
This will show a preview of each comp. Based on the previews, you can decide whether to add the comp or not. If this option is off, a comp with an address that matches a record in the database will be skipped.
Import photos with comps.
Select this option if you wish to be able to view photos of your comparables. If this option is checked, a copy of the comparable's photo will be extracted from the report and added to your images directory. The photo can then be automatically imported when you place a comparable in a report.

Import comparables from your existing report with the Import button. Just Mark the folders you wish to import and click OK.

Adding and Removing Properties

Type in a comp from scratch:

1. When in the Comparables Database, click on the **Add** button.
2. Select **Manually**. You will be given a blank database record in which to type values.
3. Use the **Additional Info** tab to specify the name of the neighborhood, custom tracking items, the actual age and actual date of sale. This is important since WinTOTAL needs a properly formatted date entry and numerical age in order to perform searches. For these items, you can specify different data for what goes in the form and what gets used in searches. See "Date and Age Field Formatting" on page 6 for more information.
4. Go to the **Images** tab and click **Manage Images** to associate images from your image database or image directory with that comparable. See "Associating images with comparables" on page 4.
5. Click on OK when you are through entering your information.

Hint: In this screen, use the TAB key to move easily to the next item or SHIFT+TAB to go back one item.

Add comparables from the open WinTOTAL report

If you have comparables already in a WinTOTAL report, you can add them to the database by doing the following:

1. Open the report and click the Comps PowerView
2. Click the **Open Database** button
3. Once in the database, click on the **Add** button.
4. You will be asked if you wish to merge a comparable from WinTOTAL or if you wish to enter one manually. Click on the **WinTOTAL** button.
5. You will then be prompted with two options regarding how to handle duplicate comparables and improperly formatted date/age fields. Click OK after deciding the action to take for these items.

Associating images with comparables

You are allowed to associate up to 8 images per comparable in the database. The actual photos are not stored with the comp. They are merely referenced by the database and they must be located in separate files on your system. If you were to delete the image from the hard drive using Windows Explorer or other means, then it would not be available to the Comparables Database.

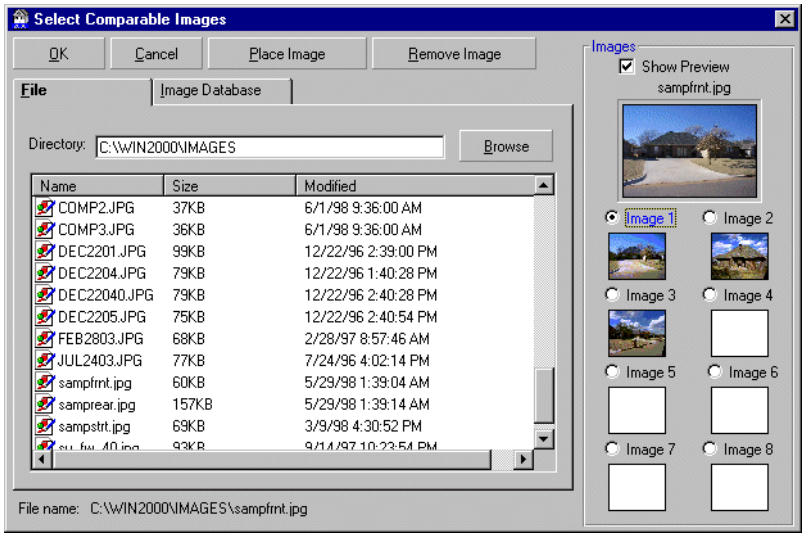
1. When adding or editing a comparable, click the **Image** tab.
2. Click on the **Manage Images** button to actually associate/remove images from this comparable.

- You may pick images from the list of image files on your system or choose from the image database.
- Sort the file/database listings by clicking the column on which you want to sort. Click once for ascending. Click again for descending.

3. Once you find the image you want with the comp, click on its entry. Then click the **Place Image** button.
4. Click OK to accept the changes.

Remove an image from a comparable

1. Highlight the comp you wish to modify.



Up to 8 images may be associated with each comparable in the database.

2. Click the **Edit** button.
3. Click the **Image** tab, then click the **Manage Images** button.
4. Click in the button for the image preview.
5. Click the **Remove Image** button.
6. Click OK to accept the changes.

Removing comparables

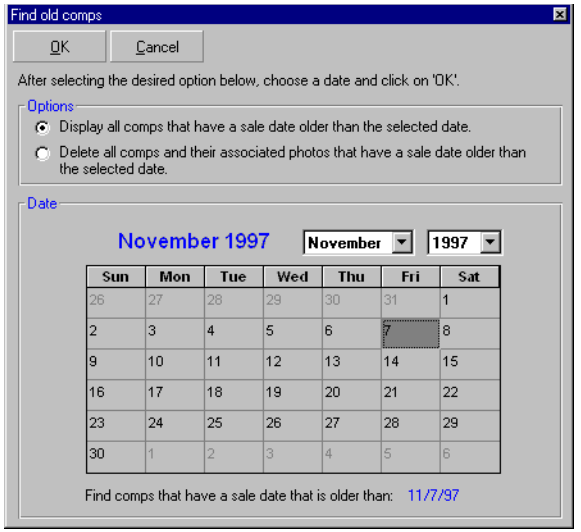
Finding / removing a batch of comparables older than a specific date: You can locate and delete comparables in your database that have expired.

1. Click on the Comps Database **File** menu.
2. Select **Find old comps...**
3. Click the **Delete all comps** item. By default, WinTOTAL saves a copy of each image used in a report with the report data, so it's okay to remove the individual image files associated with properties in the database. The photo is with the report.
4. Select the month and year from the drop down list.
5. Click the day on the calender.
6. Click OK.

Placing comparables into the current report

Let's assume you've found a comparable in your database that you wish to use in a report.

1. If photos are saved with the comparable, use the **Next** / **Prev** buttons below the photo preview the photo you wish to use. You can view the full version of the photo by double clicking on its preview. WinTOTAL will automatically place the displayed photo onto a comparables photo page.
2. Double click on a comparable you want to insert into your currently open report. You'll see a hash mark (**>>**) appear in the Mark column. This will also "lock" the photo view onto the current photo.
3. Click on **Place** and it will be pushed into the WinTOTAL report as the Comps Database closes.


Find old comps
OK
Cancel
After selecting the desired option below, choose a date and click on 'OK'.
Options
Display all comps that have a sale date older than the selected date.
Delete all comps and their associated photos that have a sale date older than the selected date.
Date
November 1997
November
1997
Sun Mon Tue Wed Thu Fri Sat
26 27 28 29 30 31 1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 1 2 3 4 5 6
Find comps that have a sale date that is older than: 11/7/97

*Select "**Find old comps...**" from the File menu to search out comparables older than a particular date.*

4. Use the **Move Up** and **Move Down** buttons on the Comps PowerView to rank the comparables. The photos and data on your photo pages will be rearranged too.

Date and Age Field Formatting

Specifying the sale date

The WinTOTAL database is quite lenient when it comes to entering dates. The following are all valid date entries for September 1, 1998:

- September 1, 1998
- 9/1
- 1-Sept-98
- 9/1/98
- Sept. 1, 1998
- Sept-98

WinTOTAL automatically converts two digit date entries to their Year 2000 4-digit equivalent.

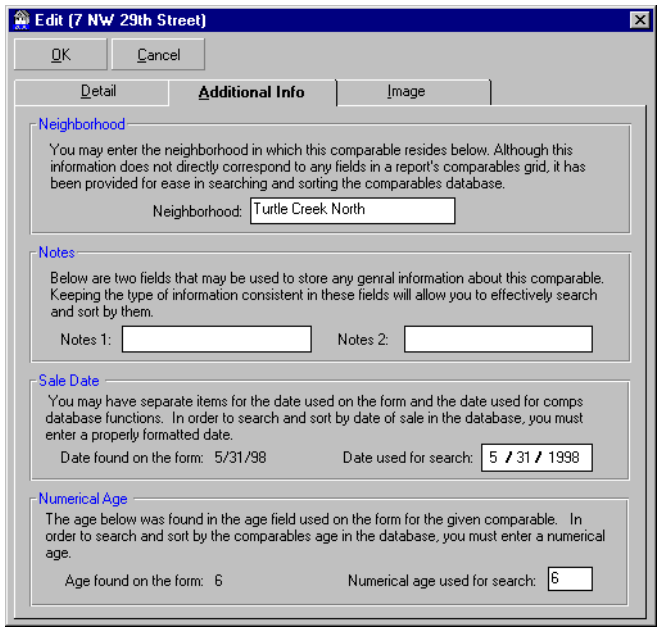
In order for a computer to search by dates, the date entry needs to be in a specific format. Quite often, more than just a date is entered into the Sale Date field, for example “CLS 11/09/98”. The information may make perfect sense to us as humans, for we can easily see which part of the text is the date. But, a computer can’t always pick which part is the date. To solve this problem, WinTOTAL populates two fields in the Comparables Database from the market section’s “Date of Sale/Time” time field.

- Using EXACTLY what was entered in the form, WinTOTAL populates a field labeled “Sale Date/Time 1". This item isn’t in the default columns, but it does get imported back to the forms.
- It also populates a field labeled “Date Sale” with its guess of which part was the date. If the program can not determine within reason which part of your text is really the Sale Date, it will leave that item blank. This field is in the default columns displayed.

Whenever comparables are added to the database, you can verify the date by going to the Additional Information tab when you click Edit.

Specifying the age of a comparable

In order to perform a search based on age, WinTOTAL needs a definite number. Since the “Age” field often contains more than just a number, WinTOTAL has separate fields for a numerical age and a textual age.


Edit (7 NW 29th Street)
OK
Cancel
Detail
Additional Info
Image
Neighborhood
You may enter the neighborhood in which this comparable resides below. Although this information does not directly correspond to any fields in a report's comparables grid, it has been provided for ease in searching and sorting the comparables database.
Neighborhood: Turtle Creek North
Notes
Below are two fields that may be used to store any genral information about this comparable. Keeping the type of information consistent in these fields will allow you to effectively search and sort by them.
Notes 1:
Notes 2:
Sale Date
You may have separate items for the date used on the form and the date used for comps database functions. In order to search and sort by date of sale in the database, you must enter a properly formatted date.
Date found on the form: 5/31/98
Date used for search: 5 / 31 / 1998
Numerical Age
The age below was found in the age field used on the form for the given comparable. In order to search and sort by the comparables age in the database, you must enter a numerical age.
Age found on the form: 6
Numerical age used for search: 6

The Additional Info tab gives you access to special fields to specify the neighborhood, formatted sale date and numerical age of a comparable.

For the textual age, you may wish to enter both the actual and effective age of a property or perhaps the year it was built. This information gets stored in the database and used on the actual appraisal form when you merge in comparables from the database.

WinTOTAL tries to determine, based on what you typed, the numerical age for a property.

- If there is extraneous text, WinTOTAL tries to strip it and uses the numbers left over.
- If the item in the age field is greater than 1500, then WinTOTAL assumes it's the year built and subtracts it from the current year.

*This information is accessible through the **Additional Info** tab when you click on the **Edit** button. You will want to verify it whenever you import comparables from the form.*

Searching using the Intelligent Query

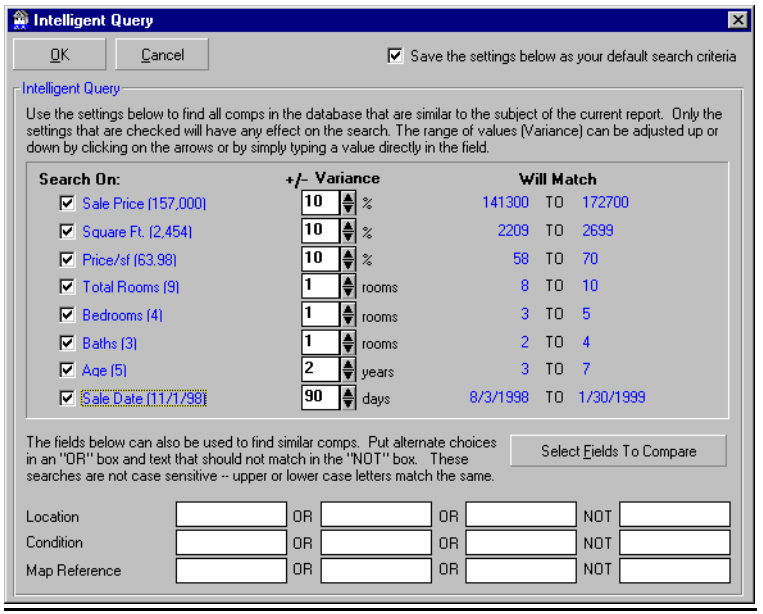
What is the IQ?

The Intelligent Query (IQ) function supplied with WinTOTAL 2000 is the most powerful database search tool available today. Instead of using literal numbers and search criteria, it uses the concept of "comparability" to the subject. Instead of specifying a "value greater x and less than y" that would have to be manually figured and entered for each and every report, it enables you to specify a "value within x percent of the subject's" value. Think of it as more of a "search model".

How to use the IQ

In order to use the search features effectively, you need to first have data entered into the subject of the currently open report.

1. Load the database through the Comps PowerView.
2. Click the **Search** button.
3. To include one of the listed items in your search, click in the checkbox beside it so that it appears filled.
4. Enter a range or tolerance for each item used. Any comparables falling within the range of values will come up as a match.
5. Click on OK to perform the search.


Intelligent Query
OK
Cancel
Save the settings below as your default search criteria
Intelligent Query
Use the settings below to find all comps in the database that are similar to the subject of the current report. Only the settings that are checked will have any effect on the search. The range of values (Variance) can be adjusted up or down by clicking on the arrows or by simply typing a value directly in the field.
Search On:
+/- Variance
Will Match
Sale Price (157,000) 10 % 141300 TO 172700
Square Ft. (2,454) 10 % 2209 TO 2699
Price/sf (63.98) 10 % 58 TO 70
Total Rooms (9) 1 rooms 8 TO 10
Bedrooms (4) 1 rooms 3 TO 5
Baths (3) 1 rooms 2 TO 4
Age (5) 2 years 3 TO 7
Sale Date (11/1/98) 90 days 8/3/1998 TO 1/30/1999
The fields below can also be used to find similar comps. Put alternate choices in an "OR" box and text that should not match in the "NOT" box. These searches are not case sensitive -- upper or lower case letters match the same.
Select Fields To Compare
Location OR OR NOT
Condition OR OR NOT
Map Reference OR OR NOT

The Intelligent Query (IQ) enables you to set up a model for searching through your database. Just click the items on which you want to search, set tolerances and click OK.

Only the comparables that met your criteria will be displayed in the list on screen. If no comparables are displayed, you'll want to click **Search** again and broaden your search criteria.

By default, the Comparables Database saves the ranges you specify for the next appraisal and notification in the Comps PowerView.

Customizing the text matching fields

In the IQ, you are not limited to matching numeric values in the market section. You are also given three other fields in which you can match specific items such as location, condition and map reference. These fields are not case sensitive and don't even require you to enter the whole word.

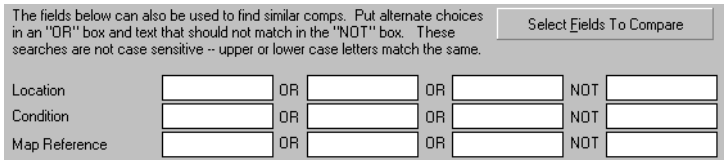
- For example, entering **urb** in the location field would find only comparables that contained text such as "urban" or "suburban" in the location field in addition to fitting the other search criteria.
- Similarly, you could enter an item in the field preceded by the word NOT so that any comparable matching that text in the specified field would not be retrieved.

As a default, we supply the Location, Condition and Map Reference fields. However, you can use any field in the database.

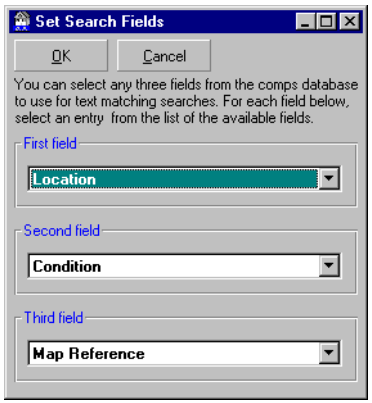
1. If you are not in the Intelligent Query screen, activate it now by clicking on the Search button in the main Comps Database window.
2. Click on the item **Select Fields to Compare**.
3. Click on OK when you have set the fields as you want them.

The text matching fields do not support operators such as **>** (greater than) or **<** (less than). They are strictly for finding the phrase you entered in any part of the specified field.

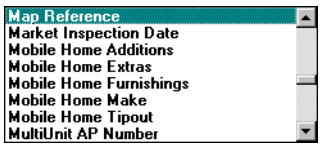
See "Placing comparables into the current report" on page 5 to place comparables found using the IQ in your current WinTOTAL report.


The fields below can also be used to find similar comps. Put alternate choices in an "OR" box and text that should not match in the "NOT" box. These searches are not case sensitive -- upper or lower case letters match the same.
Select Fields To Compare
Location
Condition
Map Reference
OR
NOT

Use the fields at the bottom of the Intelligent Query screen to search on text.


Set Search Fields
OK
Cancel
You can select any three fields from the comps database to use for text matching searches. For each field below, select an entry from the list of the available fields.
First field
Location
Second field
Condition
Third field
Map Reference

Click the arrow to get a drop-down list of text fields on which to search.



Printing Comps Database Reports

Generate a hard copy of comp data

1. First perform a search to find a set of records.
2. Click on the Reports button and you'll see a list of reports available for the Comparables Database. You'll want to run each one to see what

kind of data and formatting they give you. (They display on screen before printing.)

3. Click on the report style you want, and then click OK.

The report will then be displayed on screen exactly as it will print.

- The current page and number of pages is shown on the left.
- The number of records is shown on the right.
- The view dropdown lets you zoom in and out.
- Use the left and right arrow buttons to advance pages for on-screen viewing.

Export comp data

The reporting tool built into the Comparables Database also allows you to export its information to a variety of formats including:

- MS Excel
- Lotus 1-2-3
- MS Access
- CSV
- MS Word
- Delimited Text
- Fox Pro
- HTML

The resulting files can be saved to your hard drive or e-mailed using a MAPI compatible e-mail program like MS Outlook or OutLook Express.

Each format has its own options regarding items such as column organization and headings when saving. Experiment with the different formatting options to find the one that works best for you.

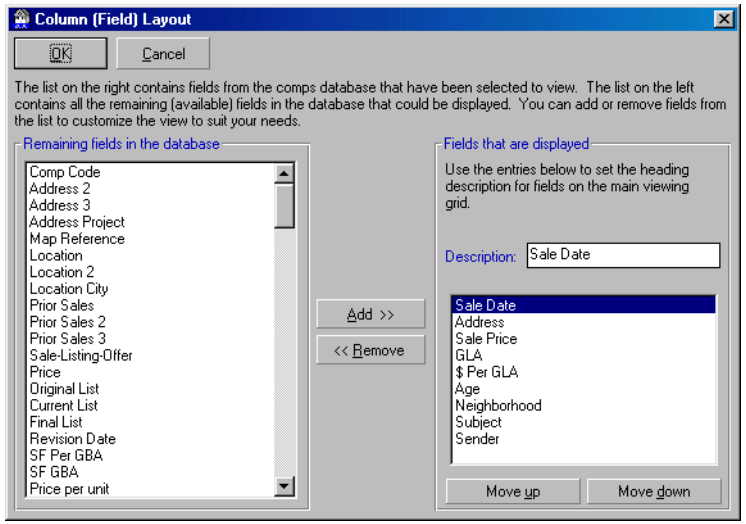
To close the reporting tool, click on the "X" in the top right hand corner of its window.

Customizing the Database View

Changing the columns you see

The columns that you see in the WinTOTAL 2000 database are completely customizable. As a default, you are allowed to see Address, Sale Price, GLA, Age, Sale Date and $per GLA. However, you can change these to whatever you like by clicking on the **Columns** button.

The list of items on the left are the fields that are currently being displayed along with their headings and the amount of space allocated to them on



screen. The items on the right are a list of all possible fields in the database for each property.

- To place an item into view, simply highlight it in the column labeled **Remaining fields in the database** and click on **Add**.
- To remove an item from the visible columns, click on the item in the **Fields that are Displayed** and then click **Remove**.
- To define the order in which the elements are viewed, highlight an item from the list labeled **Fields that are Displayed** and click on either **Move Up** or **Move Down**.
- Click on OK when you are done.

Sizing the columns and screen

You can change the column widths of the Comparables Database just as you would in a spreadsheet program.

- When you are in the main database window, notice that when you move your cursor toward the left or right edge of a column heading, it changes to something that looks like a double arrow. When your cursor looks like this, you can hold down your left mouse button and drag the column to the desired width.
- The Comparables Database also functions like any other window in MS Windows. If you desire, you can stretch the entire screen by clicking on its border and dragging. Or, you can make it full screen by clicking on the maximize button.

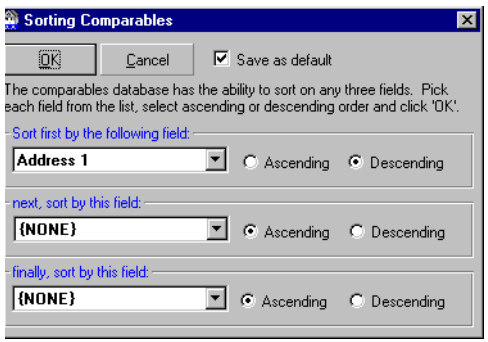
How to sort comps

Some users prefer to use sorting in lieu of querying to find comparables for a report. To sort your comparables:

1. Click on the **Sort** button.
2. Select the fields on which to sort. You have three levels. If two comparables are the same for the primary sort field, they will subsequently be sorted on the secondary field and so on...
3. Click OK.

To sort by date, select the Date Sale field. This is the date field which is properly formatted. The plain Sale Date/Time field is the text that gets inserted into the form.

Click on the Sort button for a three level sort spec.



More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

Photos PowerView

Photos PowerView

The Photos PowerView is your one stop shop for placing digital images on your photo pages. In this one screen, you can access digital cameras, read files from the integrated database, browse a file directory or acquire from a scanner or other TWAIN device. This chapter will cover:

- Downloading photos from a digital camera
- Using scanners, disk files and other sources for images
- Managing photos in our integrated database
- Placing photos on the photo pages
- Optimizing your digital images to save disk space
- Enhancing photos

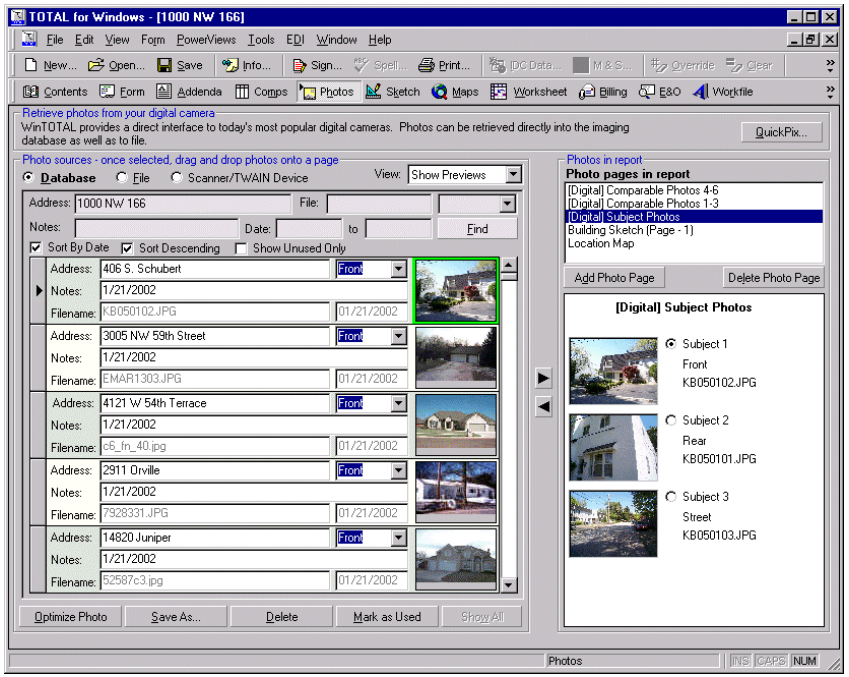
Configure WinTOTAL's compression

Before downloading any photos, we strongly recommend examining your compression vs. quality settings. The default setting in WinTOTAL and on your digital camera is to use the highest quality setting.

- In practice, when taking pictures of houses at a distance and printing them at 3X5 or smaller, you won't see any visible difference in photos. (We recommend using the photo pages labeled [small].)
- You will notice a difference in download times and the number of images you can save on your camera if you adjust the quality setting on your camera as well the software.
- You'll also see your report file size go down and the number of files you can save on your PC go up.

You only need to tell WinTOTAL one time what settings to use for photos.

1. On the Appraisal Desktop, click **Preferences**. From the WinTOTAL Configuration Options, select the **Photos** Shortcut. Nine labeled icons appear in the Shortcuts menu.
2. Click on the tab labeled **Miscellaneous**. You'll see a slider labeled **High Resolution JPG photos**.
3. By default, that slider will be set to 95%. This setting will result in images that will be anywhere from 250K to 500K.



Use the Photos PowerView to place digital images into all the photo pages in your report. You don't even have to load the photo page on screen since WinTOTAL automatically maintains all the data on the forms themselves.

4. Change the slider to read 50%. Your downloaded photos will go down to 100K to 200K and you won't notice a difference on printouts.
5. Click OK. These new settings will take effect only on photos you download AFTER the change. Photos in your existing reports will NOT be affected even if you open and save the report.

The photos in the sample report were saved with a 35% quality rating. Experiment with different settings to find the one that works best for you. Be sure to see *"The Image Optimizer"* on page 10 to learn how to have WinTOTAL resize and recompress photos automatically.

Pre-entering comp addresses

If you already know the address of the comp photos and you are using them in the current report, it is best to go ahead and type them into the form. QuickPix, our photo downloading module, will read those addresses from the form and allow you to easily put them with the photos. This keeps you from having to match up the fuzzy preview with a property and it is one way to prevent dual data entry.

Getting Started with a Digital Camera

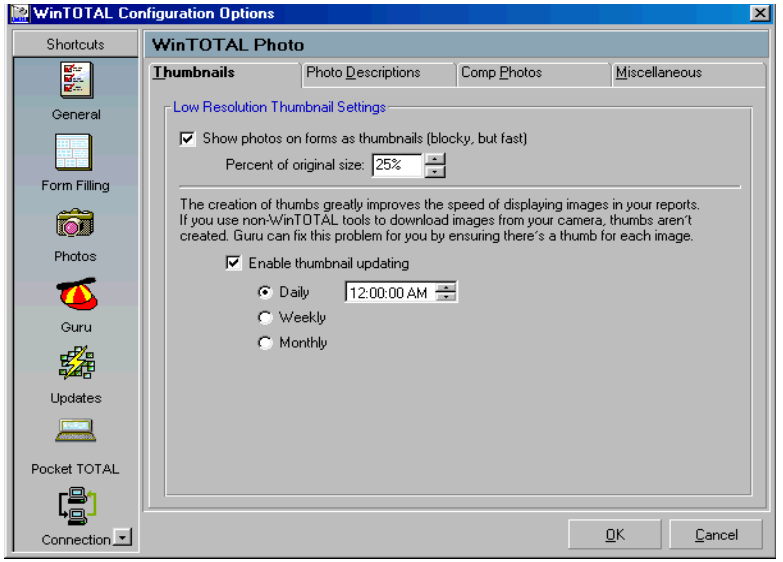
Launching the photo downloading module

QuickPix is our popular photo downloading utility.

- QuickPix has built-in serial drivers for many popular cameras as well as an interface for floppy disks and reading images from card readers and mounted disks.
- Store images in a variety of formats so they may be used in other applications outside of WinTOTAL.
- Track your images in a Microsoft Access compatible database.

For instructions on how to use the camera controls and interface, please reference the booklet included with your particular camera.

If you are in WinTOTAL, simply click on the **QuickPix...** button on the Photos PowerView. You can also run the downloading module separately from the program by clicking on its icon in the WinTOTAL program group. This is quite handy if you are on a network since one person can download and label the images while the other works up the report.



Customization for your digital photos is accessible through WinTOTAL's main configuration dialog. Click Tools and then Configure.

Configuring for a camera that uses a cable connection

WinTOTAL has built in interfaces for popular cameras made by Epson, Kodak and Logitech. If you are using a Sony Mavica or other camera that transfers pictures straight from a diskette or memory card without a serial cable, you may skip straight to either *"Configuring for a card reader"* on page 4 or *"Configuring QuickPix to read a floppy disk"* on page 5.

The first time you use QuickPix, you'll need to tell it which kind of camera you're using, the port to which it's connected and the speed at which that port can communicate with the rest of your system.

Step One: You'll be prompted the first time you run the WinTOTAL Digital Photo Wizard, but you can always get back to the configuration by pressing CTRL+T. Selected the Camera, Port and Baud Rate,

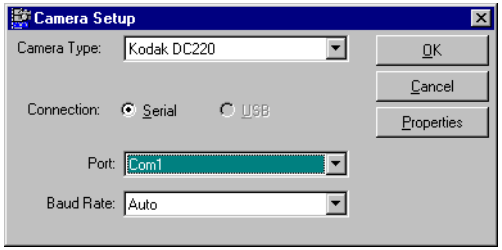
Step Two: Make sure your camera is on and click **Properties** to access to more of the cameras settings. If you experience errors after clicking Properties, it may be due to one of the following reasons:

- Wrong or invalid COM port selected - consult your PC's documentation regarding its external ports.
- Baud Rate too high - Try reducing gradually until successful.
- Wrong camera type - Make sure the right one is highlighted.
- Low camera batteries or bad connection.
- Camera is turned off or "asleep" - Try opening the shutter before downloading.

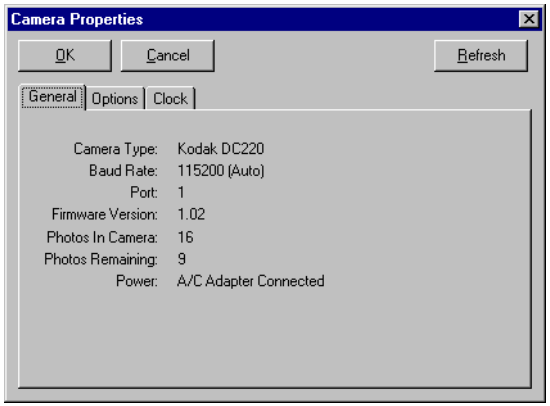
I*f you experience errors while configuring the camera, the first step should be for you to try to use the manufacturer's interface.* (This is to determine if it's a hardware or software problem.) If the configuration fails with the manufacturer's program too, then we recommend contacting them since the basics of connecting the camera and PC is their specialty.

If you are able to configure your camera through the manufacturer's interface, but not WinTOTAL, make no hesitation to contact our tech department so we can help you set up our software.

Step Three: Assuming your camera and PC are "talking", you'll see additional options after clicking on Properties. Since each camera has its own capabilities, you should refer to the manufacturer's documentation regarding your camera's functions. However, you'll probably find that the



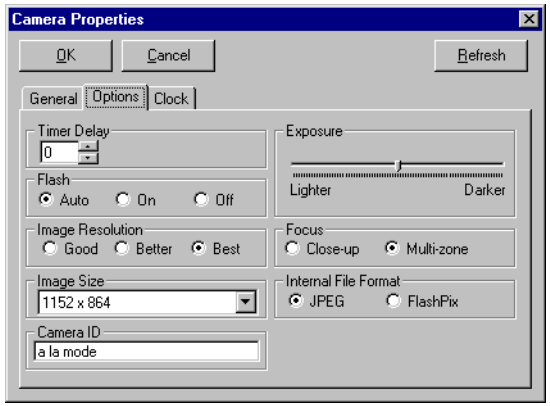
When using cameras that hook up via a cable, you need to tell Quick-Pix the port and the speed. Using the actual port is better than using the Auto setting.



Once your camera is connected, you'll be able to activate the Properties function to configure your camera.

options described in the configuration screen are logical and don't need a lot of explanation.

- You'll first see a General screen. Click on the tab labeled Options to see what is available for your particular camera.
- On Kodak cameras, we recommend setting the resolution to good and using the maximum image size.
- If you find yourself continually adjusting the brightness on your photos after they are in your reports, configure your camera's exposure settings for brighter pictures - that way they look better on the way in. You will save time and have higher quality photos.



These are settings for a Kodak DC220. Settings for other cameras may look different, but the options should be self explanatory.

Configuring for a card reader

If you have a camera that uses removable memory, you should also investigate an inexpensive card reader. For around $50, you can buy a device that will treat a camera's memory card like a hard drive. Reading images that way is a lot faster than the cable with a lot less hassle. Contact an a la mode representative at 1-800-ALAMODE for details.

These card readers, such as those made by SanDisk or even built-in to newer digital cameras include software that, once installed, creates another drive letter on your PC whenever connected. The size of the drive is the same as the amount of memory on the card. If you haven't already installed the software that came with the card reader, do so now.

Next, you need to do is determine what drive letter your card reader is set as. To do this, follow the directions below.

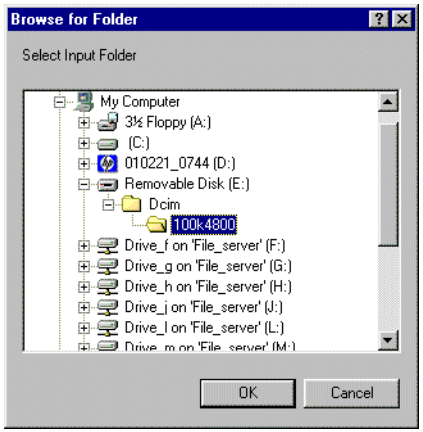
1. Double click My Computer.
2. In the list of drives you should see removable disk - E:\ or F:\ etc. - The card reader will typically be a letter drive that reads Removable Disk and naturally wasn't there before you installed the device.
3. Close the My Computer / Explorer window.

If you can't find the drive letter, make sure the card reader is plugged in and configured per the instructions included with it. You should see a light illuminated when a card is inserted. Now we need to set QuickPix to read from this drive letter.

1. Open QuickPix.
2. Click the Disk/Directory/Card menu.

3. Click Card Setup.
4. Click the Browse button.
5. In the lower portion of the window your now viewing you should see “Drives:”. From the drop down list choose the letter drive that we located in the directions above.
6. Now in the larger portion of the window, the drive you selected should be showing with one or more folders below it. If this is a Kodak camera you should have a folder named DCImages. This name may be shortened to something like DCIM. (And there may be another drive underneath it with a name resembling your camera. Basically, you want to go as deep into the directories as you can. It’s different depending on the camera.) Double click that folder and it should appear that the folder looks Open.
7. Click OK and then OK again.

You should now be able to continue loading your photos as described in *“Labeling the previews and retrieving the images”* on page 6. If no previews come up after selecting load previews, repeat the steps above and verify the path you selected to the images.



When you have a card reader or a camera that mounts itself as a removable drive, just configure QuickPix for the Disk/Directory/ PC Card option.

Configuring QuickPix to read a floppy disk

Cameras like the Sony Mavica save images straight to a floppy disk, eliminating the need to download them through a serial cable as well as the additional processing that is often required. This saves you from having to worry about COM port conflicts or buying additional hardware. Using QuickPix in this configuration is much more convenient than using WinTOTAL’s “File” method alone.

- Copies the image from the source to WinTOTAL’s images directory and applies JPEG compression that you configure through WinTOTAL to optimize the size of the file.
- Assigns a new file name based on WinTOTAL’s naming scheme - the original image will remain in the disk.
- Allows you to label the image and then logs the image into a database as it copies it. Once in WinTOTAL, you or anyone on your network, can reference it via address or whatever you labeled it.

Here’s how to configure QuickPix for a camera that uses floppy disks:

Camera Setup
Camera Type:
Sony Mavica
OK
Cancel
QuickPix 2000 may be configured to read digital photos that have already been saved on a disk or in a folder on your system. Please specify the folder or drive below where your digital images are saved.
Retain image quality (no additional compression)
Path to Photos:
A:\
Browse

WinTOTAL has an interface to read images from floppy disks and automatically catalog them in the database.

1. Simply press CTRL+T to get to the configuration dialog. (It will pop up automatically the first time you run it.)
2. Pick your camera type. If you have a Sony Mavica, choose that option and check the box that says Retain image compression.
3. Verify the drive and directory to which QuickPix is looking to read photos. For Mavicas, this is obviously the “A” drive.
4. Click OK Then, proceed with the next section.

Retrieving the Images

Overview

After you have configured WinTOTAL to work with your camera (which you only have to do once) the process of downloading images from your digital camera into your appraisal forms is summarized as follows:

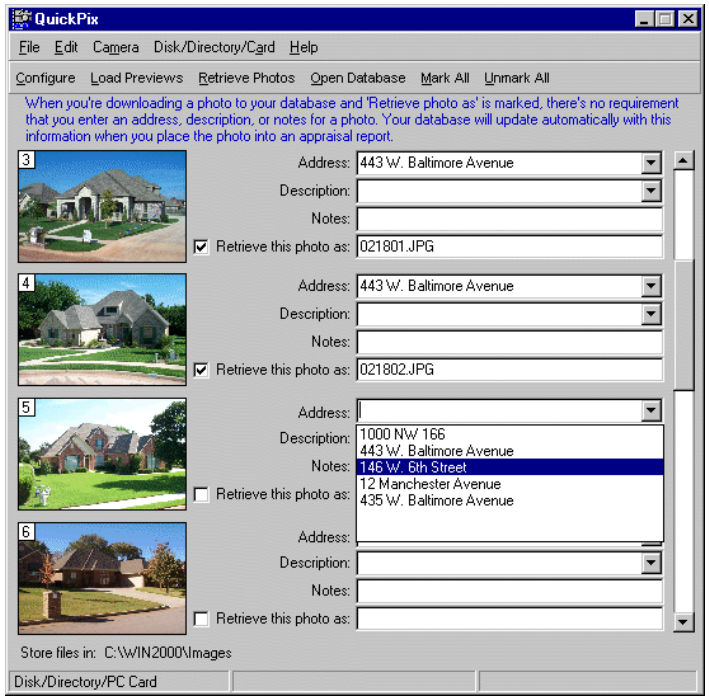
1. Display and label the previews.
2. Download the complete images.
3. Return to the Photos PowerView.
4. Locate the image in the database.
5. Associate images from the database into the photo page.

Now, we’ll describe each of these steps in a little more detail.

Labeling the previews and retrieving the images

QuickPix allows you to first see previews or “thumbnails” of the images in the camera before taking the time to acquire the whole picture. It automatically assigns a filename to the pictures it downloads and insert them into the WinTOTAL images database. Here’s how to do it.

1. Click the **Load Previews** button.
2. Once the previews are loaded, check and label each one you want to download. If you don’t want to label the photo, that’s okay - WinTOTAL will still list it as an unused photo. If you use it from the database of unused photos, WinTOTAL will update the database with the address of the property you used it with. Previews that don’t have the “Retrieve this photo” item checked will be skipped.
3. After you have marked the previews, click **Retrieve Photos**. After the photos are downloaded, their file name will appear on screen with the


QuickPix
File Edit Camera Disk/Directory/Card Help
Configure Load Previews Retrieve Photos Open Database Mark All Unmark All
When you're downloading a photo to your database and 'Retrieve photo as' is marked, there's no requirement that you enter an address, description, or notes for a photo. Your database will update automatically with this information when you place the photo into an appraisal report.
3
Address: 443 W. Baltimore Avenue
Description:
Notes:
Retrieve this photo as: 021801.JPG
4
Address: 443 W. Baltimore Avenue
Description:
Notes:
Retrieve this photo as: 021802.JPG
5
Address:
Description:
Notes:
1000 NW 166
443 W. Baltimore Avenue
146 W. 6th Street
12 Manchester Avenue
435 W. Baltimore Avenue
Retrieve this photo as:
6
Address:
Description:
Notes:
Retrieve this photo as:
Store files in: C:\WIN2000\Images
Disk/Directory/PC Card

If you have addresses already typed in your forms, all you have to do is use the drop down list to label your photos.

preview. This is so you can tell which photos have been drawn from the camera.

4. When you are through downloading images, exit QuickPix by selecting **Exit** from the **File** menu, and return to WinTOTAL.

Placing photos when previews are labeled

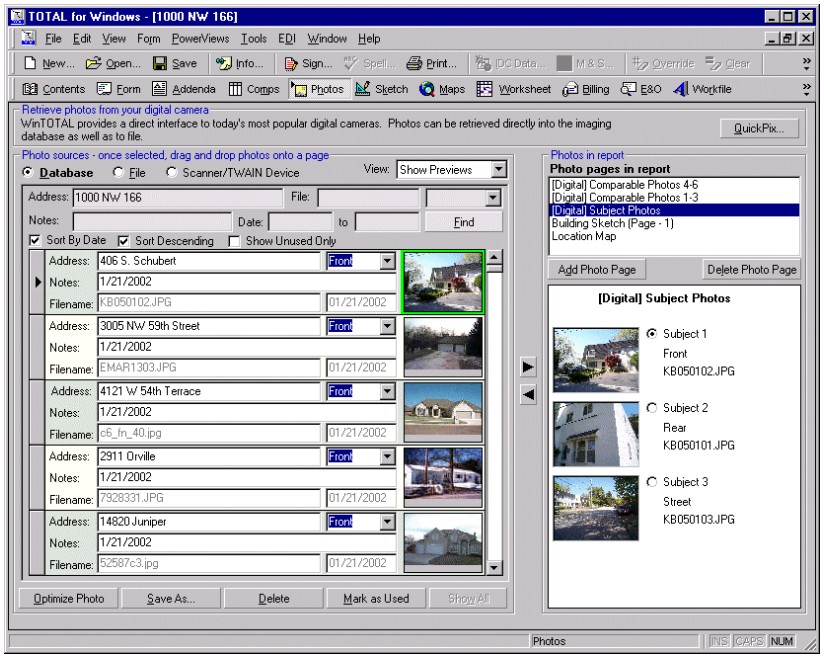
By the time you're dropping photos onto a page, you should have the addresses for the comparables typed into the forms. If you haven't done this already, do it now.

1. We first need to select a form in which to place photos. At the right of the Photos PowerView is a section labeled **Photo pages in report**.
2. Click on the first form for which you want a picture. For the sake of example, pick a comparable photo page.
3. In the Photo Management section of the Photos PowerView is an option for **Database**. Click on it to make sure it is active.
4. Click the stamp sized image placeholder on the right of the Photos PowerView. You should see the address that is beside the image frame appear in the Address field in the Photo Management section.
5. If the photo you're placing doesn't have an address with the frame (like a subject or listing photo) you'll need to type the address in the address field. You don't need to type the whole address just part.
6. Now click **Find**. The cursor should jump to the first entry that matches what you typed.
7. Click once the database entry and you'll see a preview appear.
8. Click the **Place** button and the image will be inserted onto the page. You can also drag images from the database to the frame.
9. Repeat these steps for each photo on the page.

Placing photos if previews aren't labeled

WinTOTAL has new functions to accommodate those whose workflow doesn't accommodate labeling pictures before downloading them into your database. Let's assume you downloaded several photos, but they don't have any addresses yet to look them up by.

1. After you've got the photos downloaded and comp addresses typed into your form, go to the Photos PowerView.



This is the WInTOTAL image database interface. The database makes it easy to retrieve and reuse photos.

2. Click on the Database button to ensure it is activated.
3. Click on the **Sort by Date** and **Show Unused Entries** only options. This will limit the photos in your list. Pair this filter with the Guru functions that automatically delete unused photos after a given number of weeks and this makes for a nice “photo queue” system.
4. You can now browse through the database for your picture. You may recognize it by sequence number or date.
5. If it is the photo you want, drag it onto the stamp sized place holder. If no address has been previously assigned to that photo, WinTOTAL will automatically assign that address.

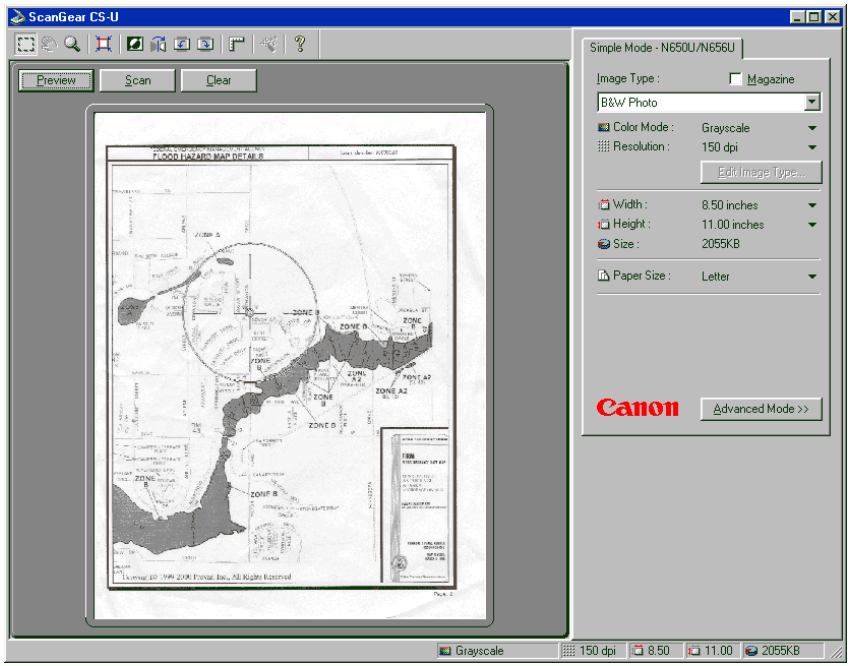
Obtaining images from other sources

Use TWAIN for scanners but not cameras

TWAIN is a standard method for acquiring a single image from a scanner or other “TWAIN compatible” device. When something is specified as TWAIN compatible, that means it’s interface may be run from a “host” program, such as WinTOTAL, and when the user is through acquiring from the device, the TWAIN compatible interface will “hand off” an image to the host program in a consistent manner. The host program doesn’t need to know anything about the separate acquisition program - just that it will deliver an image.

In theory, TWAIN works great and is well suited for scanners and very high end systems. For a graphics artist, it is very handy to be able to access a TWAIN compatible scanner through their favorite image editing software! In the scope of appraisal forms, TWAIN can be quite cumbersome:

- Only one image can be passed at a time through TWAIN.
- Loading and unloading the TWAIN interface 9 times during the course of one appraisal is time consuming and inefficient. (That’s why we developed the batch download/database process for common cameras.)
- A manufacturer’s TWAIN interface will likely look nothing like the rest of the appraisal program and certainly won’t be able to interface with its functions.



Scanning is an easy way to get already printed information into your reports. WinTOTAL communicates using the TWAIN standard. So, when you click Acquire, it launches the software that came with your scanning device; then WinTOTAL “waits” for it to send the image back. You may scan through the Photos, Maps and Digital Workfile PowerViews - depending on your intended usage of the image.

Photos PowerView

Despite the weaknesses noted about TWAIN, we have incorporated TWAIN capabilities into WinTOTAL - primarily to give users one button access to devices that aren't supported directly through our software. To acquire an image through TWAIN, do the following:

1. Go to the Photos PowerView.
2. Click the Scanner / TWAIN device option. (The first time you use TWAIN with WinTOTAL, you'll also need to click on Select Device button to select your TWAIN device.)
3. Click Acquire.
4. WinTOTAL will then load the "TWAIN" driver for your scanner. At that point, use that program as directed by the manufacturer to scan or acquire the image. Usually, you click "OK", "Close" or "Send to" option to send the image to the "host" application - WinTOTAL here.
5. Drag the image into the desired place on the selected form. The image will be saved inside the appraisal report.
6. You may add this image to the database by clicking on the **Add to Database** button.

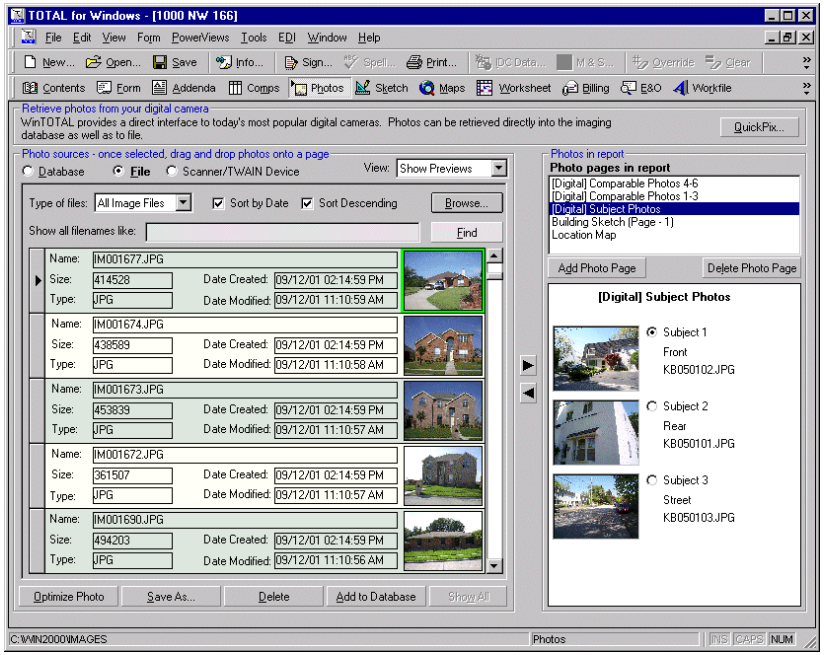
Access images by file name

All you need to know is the name of the file that contains the image, or perhaps the date it was created.

1. First, load a form that supports photos.
2. Click the Photos PowerView.
3. Click **File**, and browse to the directory where the image is located.
4. Click on the image name you want to use and you'll see a preview appear. You view the image in full resolution and even enhance it by clicking on the **Optimize Photo** button.
5. Select the form and which photo you are wanting to place. Then, click on place photo.

Cut and Paste Images

By using the Windows clipboard, you can easily cut and paste images into your forms. The only drawback to cutting and pasting is that not all programs cut and paste the same - sometimes depending on your PC.



WinTOTAL also lets you browse for photos by file name and gives you an easy way to put them in your database if you didn't download them through QuickPix. We strongly discourage the habit of always using the file list since it will become cumbersome once their are hundreds of image on your system.

1. Go to the Forms PowerView and load a WinTOTAL form that supports images. Keep in mind that most of the sketch and map pages are simply forms with one big image on them.
2. Switch to the application that is currently displaying the image you want on your form. This could be a mapping program, a sketch program or any graphics program.
3. Use that application's **Copy** command (usually in the Edit menu) to copy an image to the clipboard.
4. Switch back to WinTOTAL.
5. Click once in the photo box.
6. Select **Paste** from the **Edit** menu.

That's it! For experienced users this may be a preferred method for some types of images. However, note that our Maps PowerView has functions for reading images off of the clipboard as well.

Viewing and Enhancing Photos

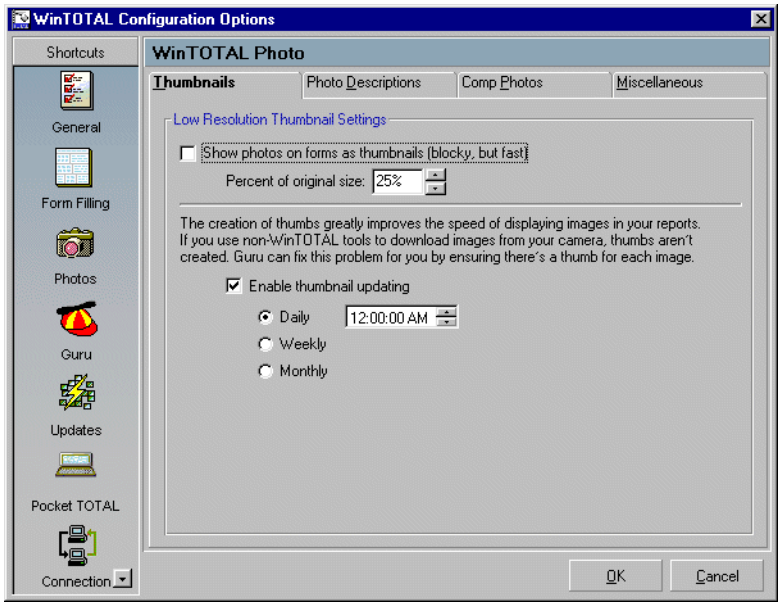
Viewing images on the forms

When you view these images on the form, they will appear distorted and blurry. This is intentional. We use a low resolution "thumbnail" version of the image for on screen display since they can load much faster than the complete high resolution version. This image gets stored in the THUMBS subdirectory. Note that WinTOTAL always uses the high resolution image for printing and transmitting the report. If you wish to always see the high resolution image on screen, do the following:

1. Click the Tools menu and then Configure.
2. Go to the Photos section.
3. In the Thumbnails tab, clear the option labeled "Show photos on forms as thumbnails (blocky but fast).

The Image Optimizer

You can access the WinTOTAL Image Optimizer from the Photo PowerView by double-clicking on the thumbnail image or selecting the image and clicking the **Optimize Photo** button. The WinTOTAL Image Optimizer contains two tabs, Optimize and Enhance.



WinTOTAL may be configured to always use the high resolution image when displaying instead of the fast "thumbnail" preview.

From the Optimize tab, you can

- Set the image size to optimize viewing and printing on the size page you will be using.
- Set the amount of color you want in your image. Fewer colors can help to reduce image file size.
- Set image detail - a medium setting usually gives great image quality and reduces file size.

From the Enhance tab, you can

- Adjust brightness, contrast, saturation and sharpness
- Rotate the image
- Crop to capture a single wanted area in the image

Try the functions in the Image Optimizer for yourself. It is designed to give you high-quality, yet disk-efficient photos without knowing much about the technical aspects of digital photography.

Enhancing photos that have already been placed in a report

These steps will enhance the copy of an image that is placed in an appraisal report. If this image was imported from the database or disk file, then the original will remain unchanged.

1. Go to the Photos PowerView.
2. Click the page that contains the image. As mentioned previously, you'll see the low resolution "thumbnail" first.
3. Double click on the stamp-sized thumbnail representation of the image you wish to enlace.
4. Select the Optimize tab on the WinTOTAL Photo Optimizer to set image size, color and detail. Select the Enhance tab to make image adjustments or crop the photo. As you make your changes, WinTOTAL has a live preview to show you what your image will look like. To return the image to it's original settings, simply click Restore.
5. Once the image looks just right, click OK and your changes will be saved. Your screen will be returned to displaying the thumbnail preview.

Image Optimizer
WINTOTAL
IMAGE OPTIMIZER
Optimize
Enhance
Step #1 - Set image size
Choose the type of page where this image is placed. Its size will then be automatically optimized for viewing and printing on that page.
Small Photo
Legal (i.e. Plat Map)
Medium Photo
Letter (i.e. Scanned Page)
Large Photo
Retain current image size
Step #2 - Determine image color depth
Set the amount of colors you prefer in your image. Fewer colors may make the image file size smaller.
Black & White Image
Grayscale Image
Color Image
No Color Change
Step #3 - Set image detail
In most cases, a 'Medium' setting provides great quality images while reducing their file sizes.
High
Medium (Recommended)
Low (i.e. Faxes or Digital Workfile Images)
Image preview
Current Image Size: 12 KB
Original Image Size: 249 KB
Have the Image Optimizer check for image files sizes over: 350 KB.
Auto Settings
Restore
Finished
Cancel

WinTOTAL's Image Optimizer allows you to adjust your photos for the best possible appearance. This can keep you from having to retake photos, saving you time and effort.

Enhancing photos in the database or on file

These steps will enhance the photo referenced in the database or on disk file. If the image being enhanced has been used in a report, the image in the report will remain unchanged since it is just a copy.

1. Activate the Photos PowerView.
2. Select an image from either the database list of file list.
3. After its preview is displayed, click **Optimize Photo**.
4. Make the necessary changes and click OK.

Auto-optimizing photos

The Image Optimizer may be configured to automatically adjust images as they are placed in reports. This much requested feature can save you the time of having to load it individually for every picture.

1. Activate the Image Optimizer.
2. Click Auto Settings.
3. Set your preferences for the image size and detail. If you are using this feature, you probably use the same ones repeatedly.
4. Click the item at the bottom of the screen which tells WinTOTAL to use these settings automatically when photos are placed in reports.

If a picture is too dark or needs adjusting, WinTOTAL provides powerful functions to assist in boosting its appearance.

The Image Optimizer may be configured to use the same defaults each time as well as automatically optimize each photo as it placed in the report.

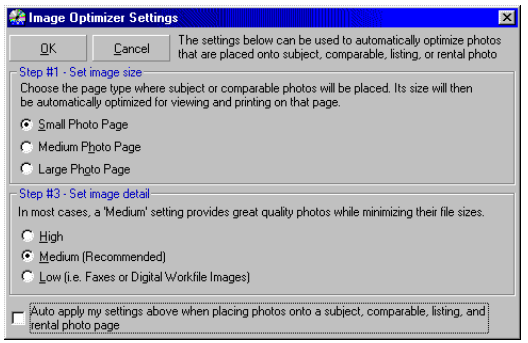


Image Optimizer Settings
OK
Cancel
The settings below can be used to automatically optimize photos that are placed onto subject, comparable, listing, or rental photo
Step #1 - Set image size
Choose the page type where subject or comparable photos will be placed. Its size will then be automatically optimized for viewing and printing on that page.
Small Photo Page
Medium Photo Page
Large Photo Page
Step #3 - Set image detail
In most cases, a 'Medium' setting provides great quality photos while minimizing their file sizes.
High
Medium (Recommended)
Low (i.e. Faxes or Digital Workfile Images)
Auto apply my settings above when placing photos onto a subject, comparable, listing, and rental photo page

QuickPix Reference

Accessing the database through QuickPix

In addition to downloading photos, QuickPix can also manipulate your image database.

- When in QuickPix, click Open Database to see all of your images.
- To view the full resolution picture, click on the View button.
- To edit the address or description, click on the record you want to edit. Then click again in the field you want to change. Your changes will be saved as soon as you leave the field.

Click the **Find** button to locate a particular address.

- You can use the drop down box to find an address in the current report. Or, you can type an address manually. You don't have enter the whole address, just the first few letters.

- Once an entry is found, you can press F3 to find the next occurrence.
- When you are through searching, click on Cancel.

Removing images from the database using QuickPix

QuickPix has flexible functions that will assist you in removing old or unwanted images from your system.

- You may use the sort function to group photos by date.
- To delete a single entry, simply highlight and click Delete Entry.

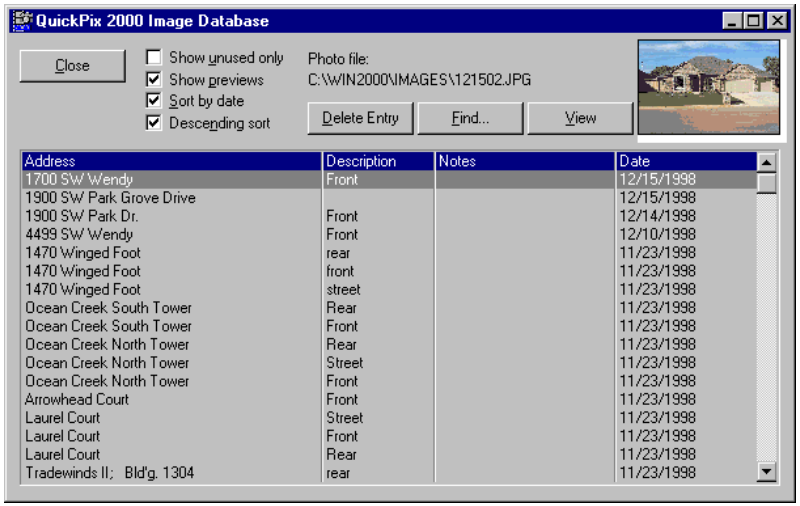
You can select a block of photos by doing the following:

1. Click the entry at the top of the list.
2. While holding your shift key, click on the last entry in the list.
3. Now, click on *Delete Entry*.

Hint: By using your CTRL key while clicking, you can select/de-select entries that aren't necessarily in order.

When removing entries, you will be prompted to also remove the image file from your hard drive. By default, WinTOTAL embeds a copy of every image in the report in which it's used so your appraisals should remain intact. However, if you turned off the embedding feature, you stand a chance of losing those photos forever. a la mode, inc. can not be held responsible for the data you delete.

Please take extreme caution when removing images from your drive. Think of it this way: You can fit 7,000 to 15,000 images in a single gigabyte of disk space - which costs less than $100. How much money do you stand to lose by not being able to retrieve a photo?



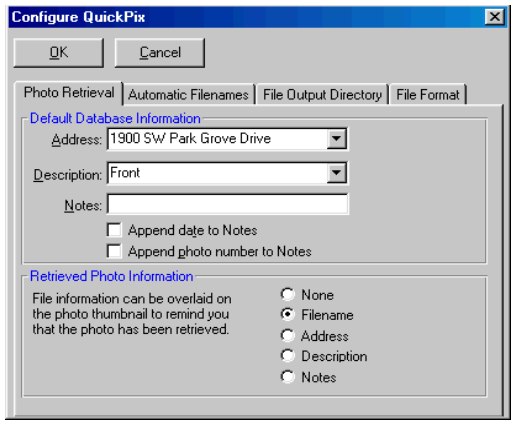
QuickPix, our image capturing module, also gives you a view into the database. This is useful for using photos outside of WinTOTAL.

Customizing QuickPix

There are a variety of ways in which you may configure QuickPix. Just click on the **Configure** button. You will be presented with four tabs representing the different areas of the program which you may configure.

Photo Retrieval - Database Defaults

When capturing images straight into the database through QuickPix, you first must display and label the previews as described on page 6. To automate the task of labeling photos, you can set defaults for the database entries. For example, if all of the images you are going to



Default database labels are handy if you have multiple pictures of the same property and you don't want to re-enter the address each time.

download are for the same address, you can enter a Default Address before displaying the previews - then perhaps change the Default Address back before downloading other images.

You also have options for what to show on screen for images that have already been downloaded during the current QuickPix session.

Automatic file names

As discussed previously, digital images are simply data files on your system. When the QuickPix utility draws them from your digital camera, it assigns them a name and stores them in the C:\WIN2000\IMAGES directory (unless you've configured your system differently). As a default, QuickPix assigns the images a file name based on the date of the download and the picture number. However, you can customize this aspect of QuickPix to meet your needs. QuickPix automatically assigns a file extension based on the format of the image.

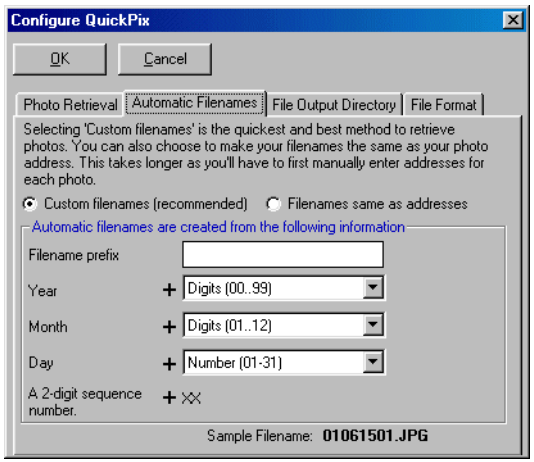
File Format - How to save disk space

Depending on your circumstances, you may need to change the format in which QuickPix saves its images. You can choose one of several formats in this dialog. As you click on each particular type of file, a brief description will appear.

File / Output Directory

Depending on your circumstances, you may need to change the directory in which QuickPix saves its images. We strongly discourage doing this since it could cause an inexperienced user difficulty in tracking images. But, if you're fairly comfortable with your system and desire a different location for images, you can certainly do so.

Another handy feature is naming your files based on their address. This makes it easier to find them without the database.


Configure QuickPix
OK
Cancel
Photo Retrieval
Automatic Filenames
File Output Directory
File Format
Selecting 'Custom filenames' is the quickest and best method to retrieve photos. You can also choose to make your filenames the same as your photo address. This takes longer as you'll have to first manually enter addresses for each photo.
Custom filenames (recommended)
Filenames same as addresses
Automatic filenames are created from the following information
Filename prefix
Year
Digits (00..99)
Month
Digits (01..12)
Day
Number (01-31)
A 2-digit sequence number.
XX
Sample Filename: 01061501.JPG

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

Apex and the Sketch PowerView

Apex and the Sketch PowerView

The Sketch PowerView is your complete interface for digital sketches and their resulting area calculations to transfer into your form. In the Sketch PowerView, you can even access sketches from previous reports.

By including the sketch as part of your electronic report, you gain several benefits:

- Floorplan looks professional.
- Sketch is saved inside the report file with rest of data.
- Sketch prints on a WinTOTAL form with the rest of your report. Header information transfers automatically to the WinTOTAL form.
- Areas can be automatically calculated and transferred to your report.

Included with the WinTOTAL Professional or Enterprise Edition is the Apex IV Windows Sketching Library. This guide is a “Quick Start” tutorial for Apex, to get you familiar with the essential drawing functions of the program. For a more detailed reference, access the full guide via the Help menu in Apex IV Windows. If you prefer WinSketch, it can be integrated with WinTOTAL reports through the Sketch PowerView too. Click here to access our ***“Sketch PowerView with WinSketch”*** guide.

Starting a New Floorplan with Apex

The Sketch PowerView incorporates all of your sketching and floor plan functions on one screen.

1. Click on the Sketch PowerView.
2. Under the **Area calculations** heading, select the appropriate options for transferring areas back to the other forms in your report. WinTOTAL will remember these for next time.
3. Click the **New** button in the top, left-hand corner of the window.
4. In the dialog box that opens, select the page style you want to use from the drop-down list labeled **Page format**
5. Click on **OK**.

You should see the Apex application appear on screen.

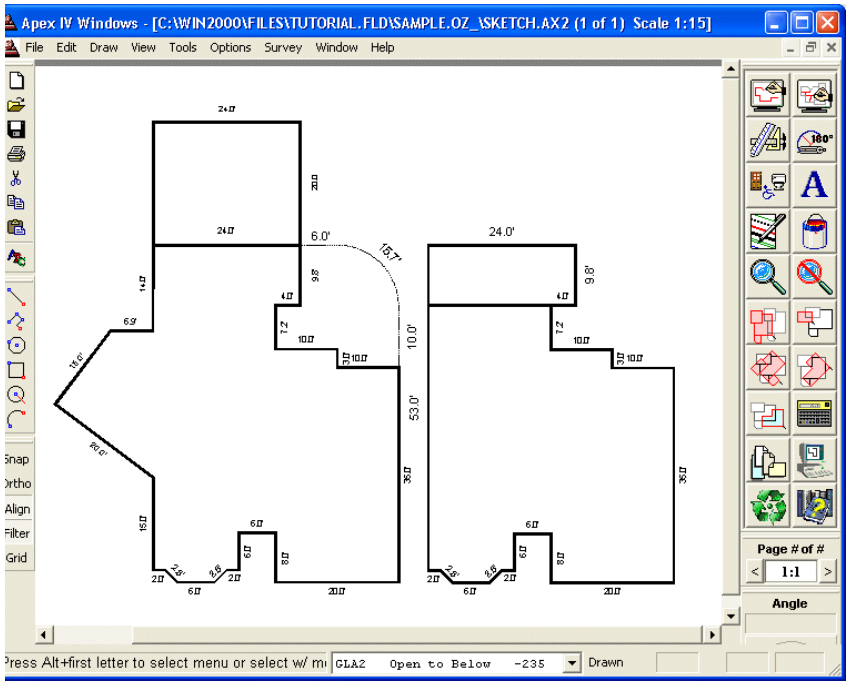
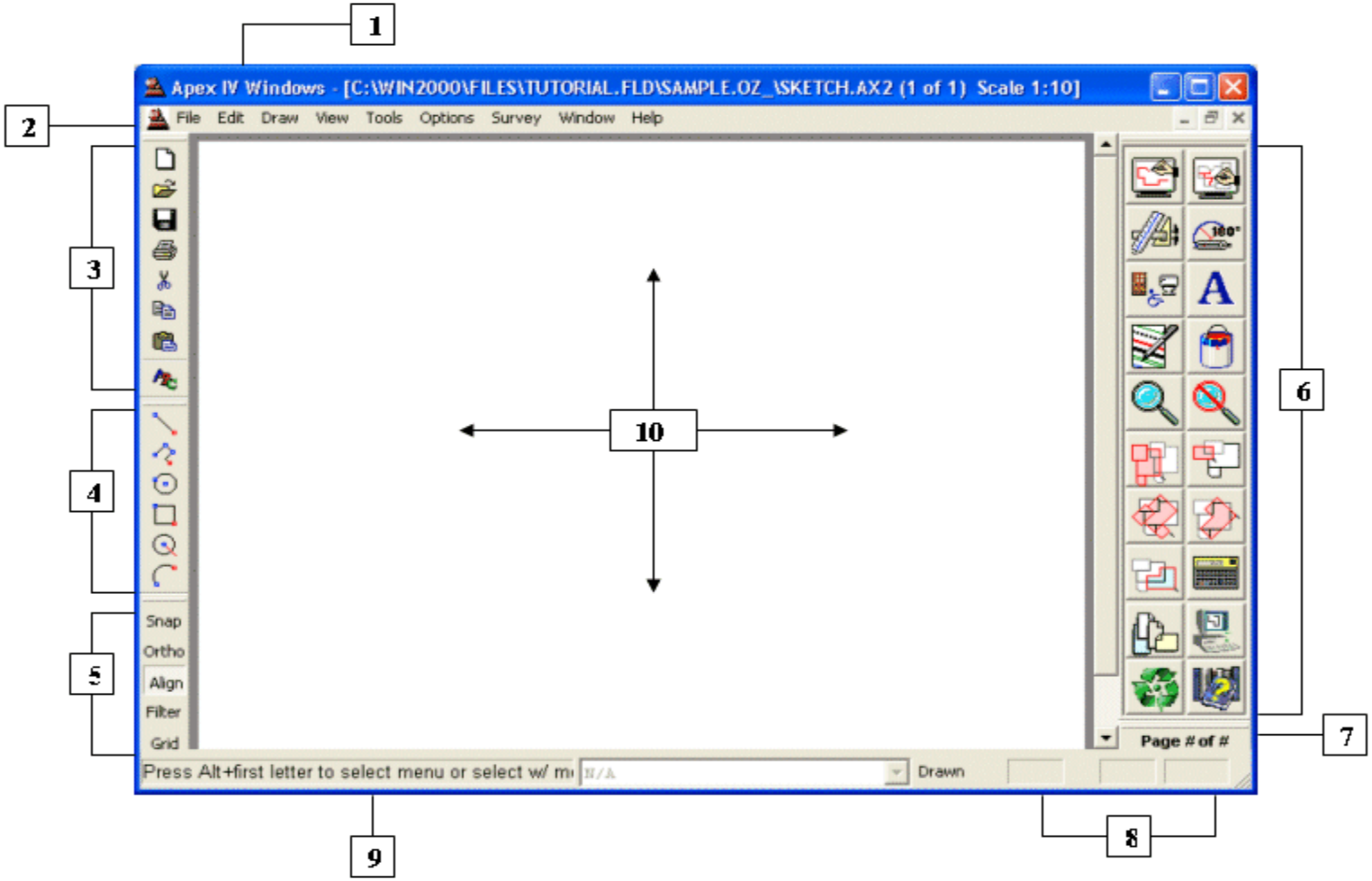


Figure I *Apex IV Windows Sketching Library is so easy to use that, with a little practice and some accurate measurements, you can create sketches like this one in around five minutes.*

Apex and the Sketch PowerView

The Apex Environment



Apex User Interface

1 **Title Bar** - Displays current file name and scale of sketch
2 **Pull Down Menu** - Allows access to every function in Apex
3 **File/Edit Toolbar** - Provides convenient access to commands
4 **Drawing Toolbar** - Allows the mouse-user to quickly and easily draw complex shapes, arcs, etc.
5 **Status Toolbar** - Displays status of current or last area completed, including square footage
6 **Command Pad** - Gives mouse users quick access to commands
7 **Sketch page Indicator** - Allows user to easily navigate between pages
8 **Tracking Port** - Displays information about the current line being drawn
9 **Help Status Line** - Provides helpful information about the current status of Apex for Windows
10 **Drawing Port** - Represents the printable area of the sketches created and edited

Basic Drawing Concepts

There are three basic steps to drawing a sketch using Apex.

1. Define an area.
2. Draw and close the area.
3. Add text, icons, etc.

Before you begin drawing perimeter walls, Apex will ask you to define and name the type of area you will be drawing. For example, Apex has predefined areas such as Gross Living Area (GLA), Garage, Basement, etc. The area definition is necessary for Apex to handle the distribution of area calculations on printouts and to pass data to WinTOTAL.

To define an area, click the Define Area button on the right. (It's the first button.) After you define an area, you may begin drawing. Press ENTER to change to Draw Mode. Your Drawing Cursor will look like this:

Engineering Input

Engineering Mode input, the most commonly used input mode, refers to a decimal unit of measure. For example, 25.5 is the decimal equivalent of 25 feet, 6 inches.

To begin drawing a line using engineering mode input,

1. Press ENTER to change to Draw Mode, then type in the line's length. Your input will appear at the bottom of the screen in the Help Status Line.
2. Press one of the arrow keys to move the cursor. (The direction you choose will determine the direction to which the line is drawn.)
3. Press ENTER to set the dimension and ENTER again to anchor the line.

Sketching in this fashion is much quicker and easier than drawing by using the arrow keys alone. As you can see in the example below, drawing a line 25.5 feet to the right, takes only three easy steps. That's all there is to it!

Type **25.5**, press → Press ENTER to set dimension Press ENTER to anchor line

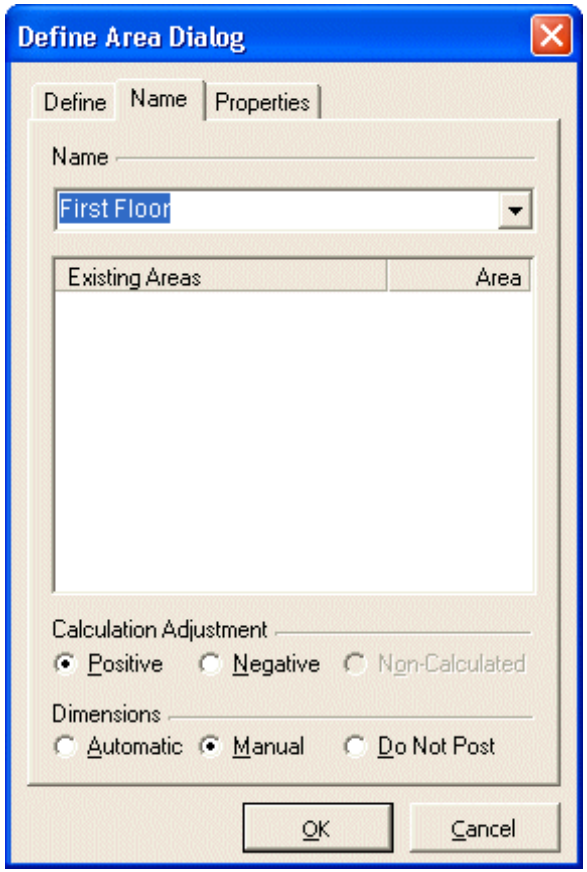


Figure 2 *The Name tab of the Define Area dialog allows you to use the default name ("First Floor") chosen by Apex or give the area a name of your choosing. The Name tab also allows you to select whether the area will be a positive or a negative area.*

Drawing diagonal lines is just as easy. Just as the Arrow keys define up, down, left and right movement, Apex has set another group of keys for 45 degree diagonal movement.

- PG UP will draw a line 45 degrees up and to the right.
- PG DN will draw a line 45 degrees down and to the right.
- HOME will draw a line 45 degrees up and to the left.
- END will draw a line 45 degrees down and to the left.

For example, to draw a 20 foot line at a 45 degree upward angle to the right, all you need to do is type **20**, press PG UP and then ENTER .

A more flexible method of drawing angles is illustrated by typing **30** (rise), pressing ↑, typing **40** (run), pressing →, and then pressing ENTER . This will draw a 50 foot line upward and to the right. This second method will allow you to draw any angle, as long as you know the angle's rise and run.

In addition to simple 45 degree angles and using rise and run, Apex will also enable you to specify and angle and wall length. This is described later on ***"Specifying an exact angle and length"*** on page 7.

Architectural Input

Architectural Mode input will allow you to input your dimensions in units of feet and inches rather than in a decimal format. In this input method, whole units will be converted to decimal equivalents as they are entered. For example, to move the cursor 10 feet, 6 inches to the left, you would:

1. Type **10**
2. Press TAB
3. Type **6**
4. Press ←
5. Press ENTER

If you were in Draw Mode, a line 10.5 feet (10' 6") would be drawn to the left, and the dimension 10.5 would appear in the Tracking Port. (See **Figure 3** and **Figure 4**.)

You can also enter multiple dimensions as fractions of inches. This is particularly useful when working off of building plans.

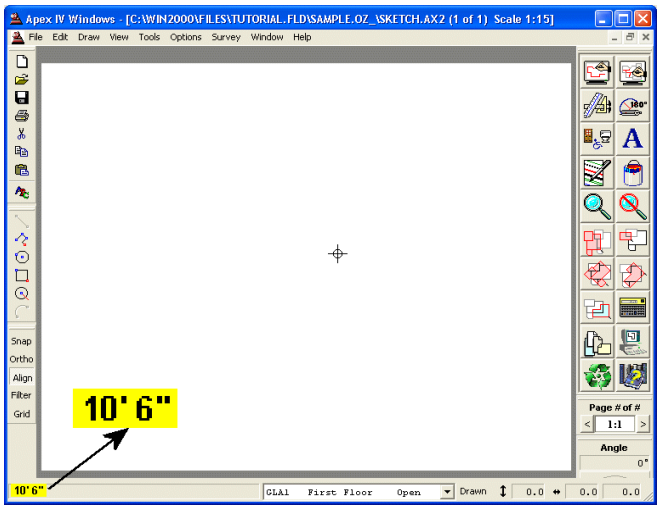


Figure 3 *The dimension in feet and inches will appear in the Help Status Line.*

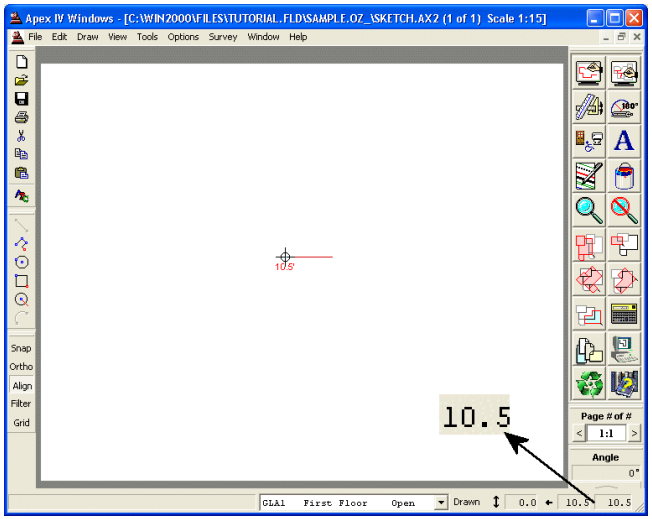


Figure 4 *The dimension in decimal notation will appear in the Tracking Port.*

For example, to draw a line 20 feet 6 ½ inches:

1. Type **10**
2. Press TAB
3. Type **6**
4. Press TAB
5. Type **1/2**
6. Press ←
7. Press ENTER

This line would display as 20.54 feet in the Tracking Port and post on the screen as 20.5.

*[**Note**: While by default, dimensions are rounded to one decimal place on the screen, they are calculated with double floating point accuracy to 15 to 16 decimal places. The number of decimal places shown on screen can be set between 0 and 4 decimal places by selecting the Precision tab under the Options/Configuration menu.]*

Drawing a Sketch

The next few pages will lead you through a step-by-step process of how the illustrated sketch to the right is drawn. These steps will provide you some insight to the functions and procedures you can utilize to create almost any sketch. Once you have become familiar with these functions, you will find that sketching, regardless of the complexity of the property, may be accomplished in just a matter of minutes.

Drawing the First Floor

Using Apex's Quick Keys feature, we will begin drawing the exterior of the First Floor area.

*[**Note**: If you place a line incorrectly, you can erase it by pressing DEL . If necessary, you may continue pressing DEL all the way back to the first line or any point in between. Conversely, pressing INS will replace any lines you just deleted.]*

1. Click the Define Area button to define the Gross Living Area.

   Your Arrow Cursor will change to the Drawing Cursor, indicating that your "pen" is down, and any cursor movement will draw a line.

2. Type **24**, press →, press ENTER twice.

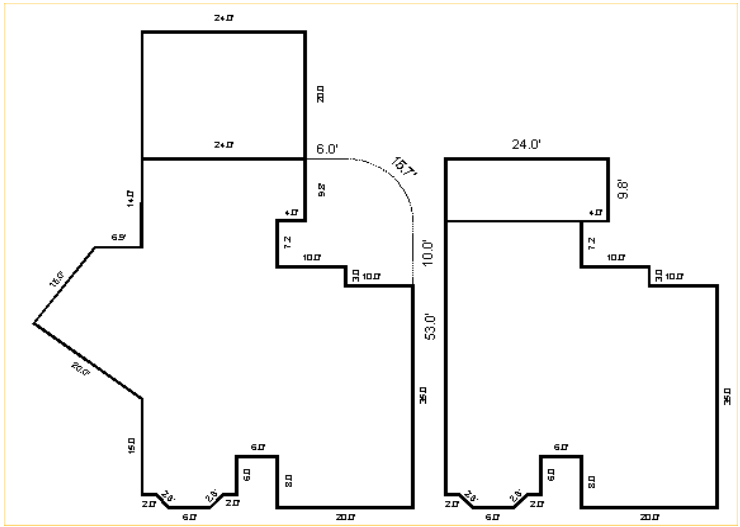


Figure 5 *This sketch might appear complicated, but with Apex IV Windows, it's only a few keyboard entries and mouse clicks away. Best of all, your calculations transfer back into WinTOTAL's forms, making your job that much easier.*

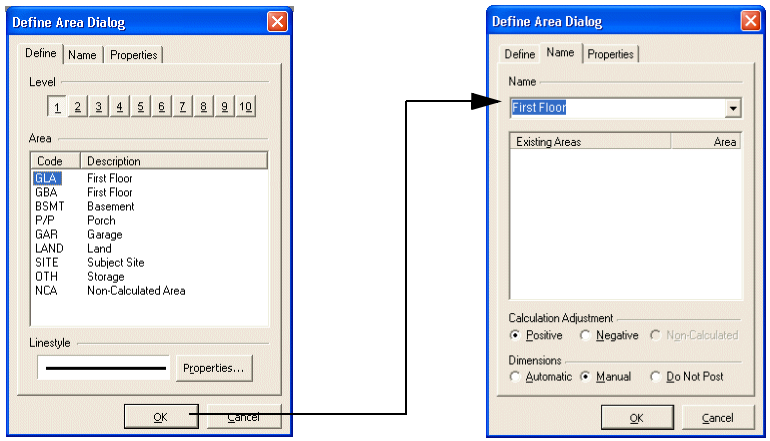


Figure 6 *After defining an area, click OK to open the Name dialog, where you can give the area a unique name and adjust calculations to positive or negative.*

As you type in the dimension, your input will appear at the bottom left of the screen, highlighted in yellow.

- Pressing → will draw the line the specified length.
- Pressing ENTER will end and anchor the line, and the dimension will appear auto-placed/rotated in the default location.

3. Type **9.8**, press ↓, press ENTER twice.

   You are drawing a line 9.8 feet down. Pressing ENTER the first time will end the line, and the dimension will appear to the right of the line. Press ENTER again to anchor the dimension in place.
4. Type **4**, press ←, press ENTER twice.
5. Type **7.2**, press ↓, press ENTER twice.
6. Type **10**, press →, press ENTER twice.
7. Type **3**, press ↓, press ENTER twice.
8. Type **10**, press →, press ENTER twice.

Notice that the 10’ line you have drawn extends beyond the screen to the right. Since you are able to determine the scale at which you wish to draw, this may happen from time to time. **Do not be concerned.** As you will see in a moment, the drawing may be easily relocated with only one keystroke. You may center the drawing by typing C to invoke the **Center Drawing** feature. You may perform this operation virtually anytime you wish, so it is not necessary to spend a lot of time trying to decide where to begin a drawing.

9. Type **35**, press ↓, press ENTER twice. (Your line will extend beyond the printable area.)
10. Press C to center the sketch.
11. Type **20**, press ←, press ENTER twice.
12. Type **8**, press ↑, press ENTER twice.
13. Type **6**, press ←, press ENTER twice.
14. Type **6**, press ↓, press ENTER twice.

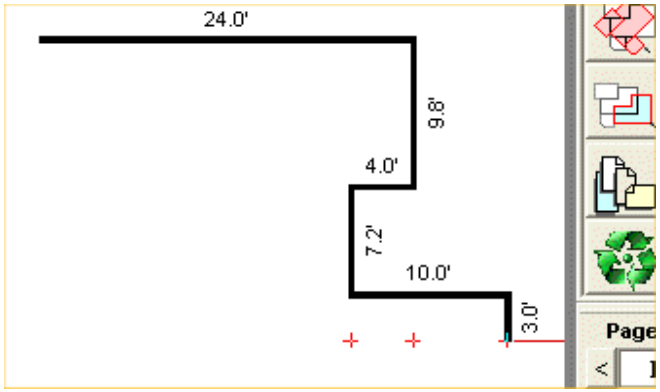


Figure 7 *When your drawing extends beyond the borders of the Drawing Pad, you can always press C to invoke the Center Drawing feature. This will bring your sketch back to the middle of the Drawing Pad.*

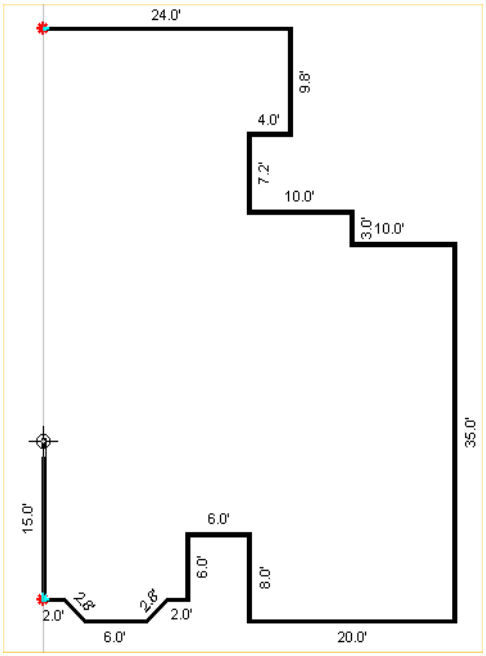


Figure 8 *After drawing your bay window angles, your sketch should look like this.*

Drawing Angles

Drawing angles with Apex IV Windows is as simple as inputting the rise and run of an angled wall. A second way to input angles is discussed later. Continue drawing your sketch to include a bay window.

Rise and Run

1. Type **2**, press ←, press ENTER twice.
2. Type **2**, press ↓, type **2**, press ←, and press ENTER twice. (This results in a 45 degree angle, 2.8 feet long.)
3. Type **6**, press ←, press ENTER twice.
4. Type **2**, press ↑, type **2**, press ←, and press ENTER twice.
5. Type **2**, press ←, press ENTER twice.
6. Type **15**, press ↑, press ENTER twice.

Specifying an exact angle and length

The second way to draw angled lines is to input the length, direction, and degree of angle. By doing so, Apex IV Windows will automatically draw the wall for you. As you might imagine, this gives you the ability to more accurately calculate square footage of properties which contain odd angles. Used in conjunction with a measuring device called a Mite-R-Gage, you no longer need to worry about obtaining the angle of walls where the rise and run are difficult to figure.

In our example property, we discovered that the angle of the "wing" to be drawn is 53 degrees. The length of the wall is 20 feet. In the direction that you are drawing, you also know that it "turns" to the left. Continue with your sketch, using the following method to draw the "wing" portion of the property.

1. Type **20**, press L, type **53**, press ENTER three times.

   The next line is 15 feet long, 90 degrees off of the last line drawn, and turns to the right.

2. Type **15**, press R, press ENTER three times.

   Notice that the degree is not necessary when drawing 90 degree angles. Ninety degrees is assumed when no degree is entered.

The last couple of lines can be determined by looking at the Tracking Port. The **Call to Point of Beginning** (**POB**) is displayed in the Tracking Port at the bottom right-hand portion of the Apex interface. As you can

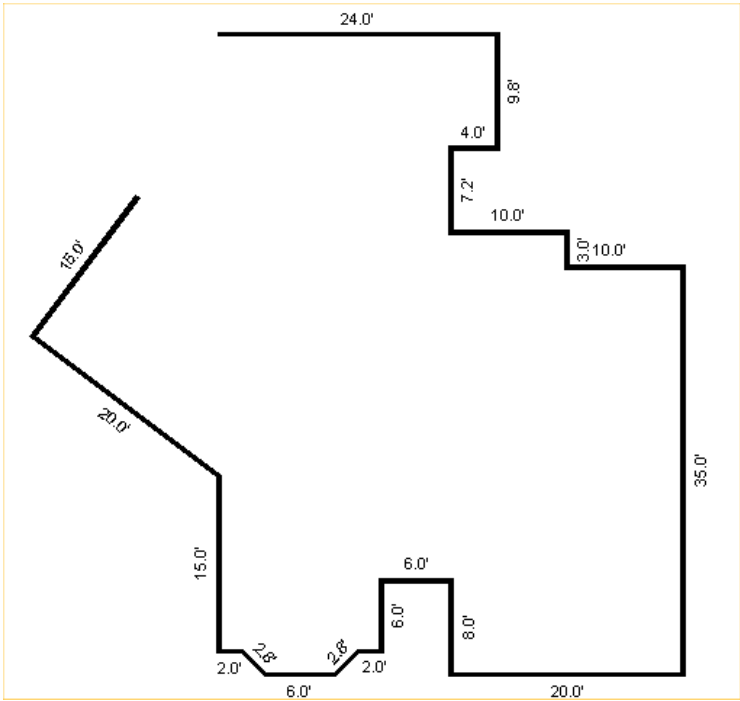


Figure 9 *After drawing the "wing" angles, your sketch should look like this.*

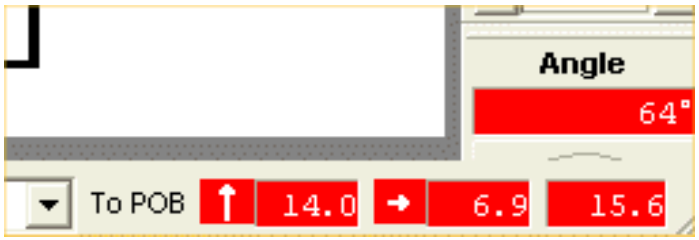


Figure 10 *The Tracking Port provides useful information when it comes time to close your sketch.*

see in the illustration in **Figure 10**, the Call to POB in our sketch is 14.0 feet up and 6.9 feet to the right. Additionally, the Tracking Port displays the angle from the current cursor location to the POB (64 degrees) and its length (15.6 feet.) With these measurements in mind, continue your sketch.

3. Type **6.9**, press [→], press [ENTER] twice.
4. Press [A], press [ENTER] twice. (By pressing [A], you invoke the **Autoclose** feature which closes the sketch and calculates the area.)
5. Press [C] to center the sketch.

Drawing the Garage

Adding the garage is a very simple procedure by which we will use another of Apex's powerful features called **Jump to Point**.

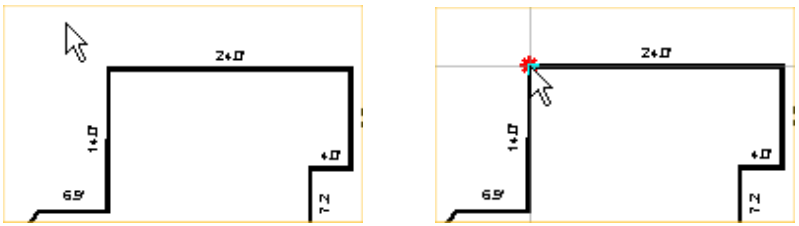
Rescale

Before doing this, it will be necessary to rescale the drawing in order to make the necessary room in the printable area. In order to do this, invoke the **Rescale Configuration** dialog. (See **Figure 11**.)

1. Press [CTRL] and [R] together.
2. Choose the scale of **1" = 15'**
3. Click **OK**.

The scale will change immediately, and we can now define our new area. Make sure the garage is defined as a negative calculation, so it won't add to your Gross Living Area's square footage.

Once your garage is defined, you may place the cursor near the upper left corner of the sketched property and press [J] to jump to a point where you may begin drawing again. (See illustration below.)



***Jump to Point** will allow you to create professional looking sketches with ease.*

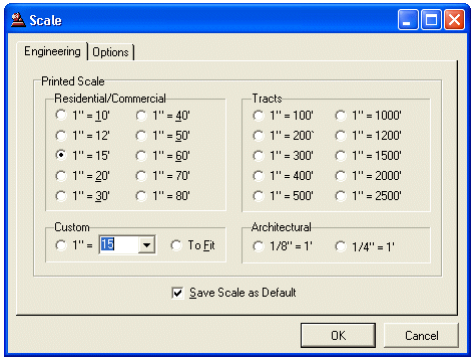


Figure 11 *The Rescale Configuration dialog allows for almost infinite scaling capabilities. You are limited only by the size of the Drawing Pad.*

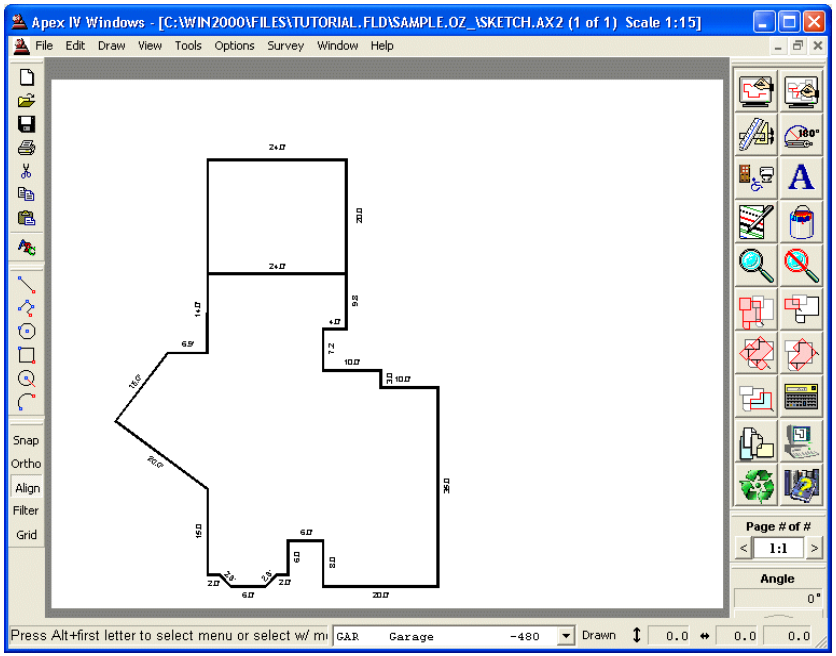


Figure 12 *With the addition of the garage, your sketch of the first floor is almost complete.*

Drawing a rectangle

Now that we have our starting point for the garage, we may draw it by simply entering the width and height dimensions by doing the following:

- Type **24 x 20**, press ENTER , type **20**, press ↑, press ENTER .

When you drew the garage, you probably noticed that it drew over the main residence. Thus, typing 20 and pressing ↑ was necessary to move the garage 20 feet up to the appropriate location. Your sketch should now look like the one in **Figure 12**.

Next we will draw the rear patio, which will teach you how to handle curves and arcs.

Drawing the Rear Patio - Curves

Adding the rear patio will introduce you to curve drawing and tracing "common walls" back to the point of beginning (POB). As always, click the Define Area button to define a new area. As you will notice, the Define area dialog names the area "porch." Feel free to rename it "patio" when the Name dialog pops up.

Now, you will have to establish a point of beginning, as you did when you sketched the garage. Your POB for the patio will be the point of intersection created by the garage and the upper right-hand side of the first floor.

Begin drawing the rear patio by following the directions below.

1. Press ENTER to establish a POB.
2. Type **6**, press →, and press ENTER twice.
3. Press F7 to invoke the **Curve Properties** dialog.

The patio sketch needs a 90 degree curve with a rise and run of 10 feet right and 10 feet down. To draw the curve, complete the following entries in the Curve properties dialog.

4. Click the **90 degrees** radio button.
5. Click the **Right** radio button.
6. Press ENTER .
7. Type **10,** press →, Type **10**, press ↓

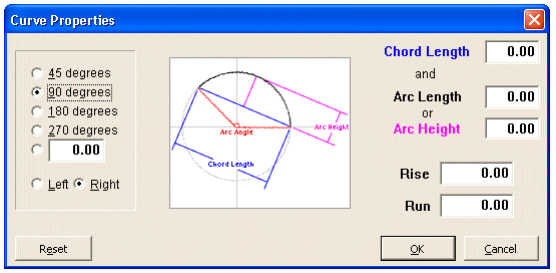


Figure 13 *The Curve Properties dialog allows you to choose the degree of curvature from a predefined set or specify the degree of curvature in the field provided. You also choose the direction of the curve, the chord length, the arc length or height, and/or the rise and run of the curve.*

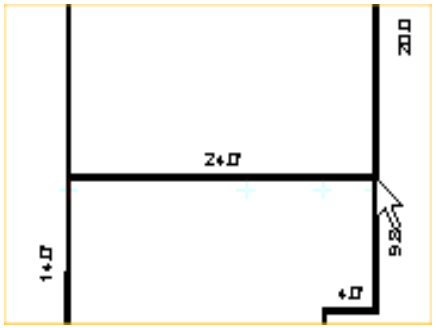


Figure 14 *Place your cursor near the intersection created by the garage and the upper right-hand side of the first floor, and press J to jump to point.*

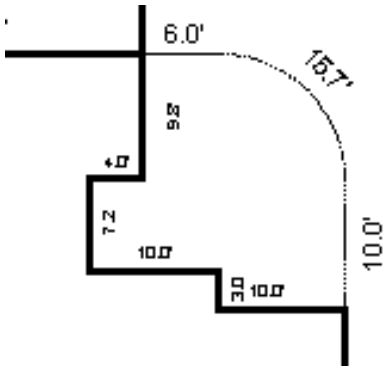


Figure 15 *When completed, your patio curve should look like this.*

8. Press [ENTER] to anchor your line and [ENTER] again to set your dimension.
9. Type **10**, press [↓], and press [ENTER] twice.

Although it now appears that the patio area is closed, it is not. The common walls must be traced back to the POB to close the area. Follow the directions below to trace the common walls back to the POB.

*[**Note**: Pressing the Space Bar after anchoring your line will blank out the dimension. Since we are tracing common walls back to the point of beginning, and those walls already have dimensions listed on the sketch, we will want to blank out the dimensions on our new lines.]*

10. Type **10**, press [←], press [ENTER], and press [SPACE].
11. Type **3**, press [↑], press [ENTER], and press [SPACE].
12. Type **10**, press [←], press [ENTER], and press [SPACE].
13. Type **7.2**, press [↑], press [ENTER], and press [SPACE].
14. Type **4**, press [→], press [ENTER], and press [SPACE].
15. Press [A] and press [SPACE] to autoclose and blank out the dimension.
16. Press [C] to center the sketch.

At this point, your sketch should look like the one in **Figure 16**.

Cloning the First Floor

Adding the second floor is accomplished by using a simple feature called Clone Area. Before we can begin, though, we must make room in the Drawing Port to accommodate the new area.

Follow the directions below to accomplish this and complete the cloning process. To make room on the Drawing Port, press the [M] key, which will display a thin red outline of the sketch, superimposed over the original sketch.

1. Press [←] to move the sketch as far to the left as it will go without moving out of the Drawing Port.
2. Once you have anchored the sketch in its new location, click **Tools** and scroll to **Clone Area**. This will display the Select Area dialog from which we will choose the area we wish to clone.
3. Select the first floor by clicking on the line which displays the code **GLA1**, and click **OK**. This will display the Define Area dialog, so that we may choose what we want to clone the first floor as.

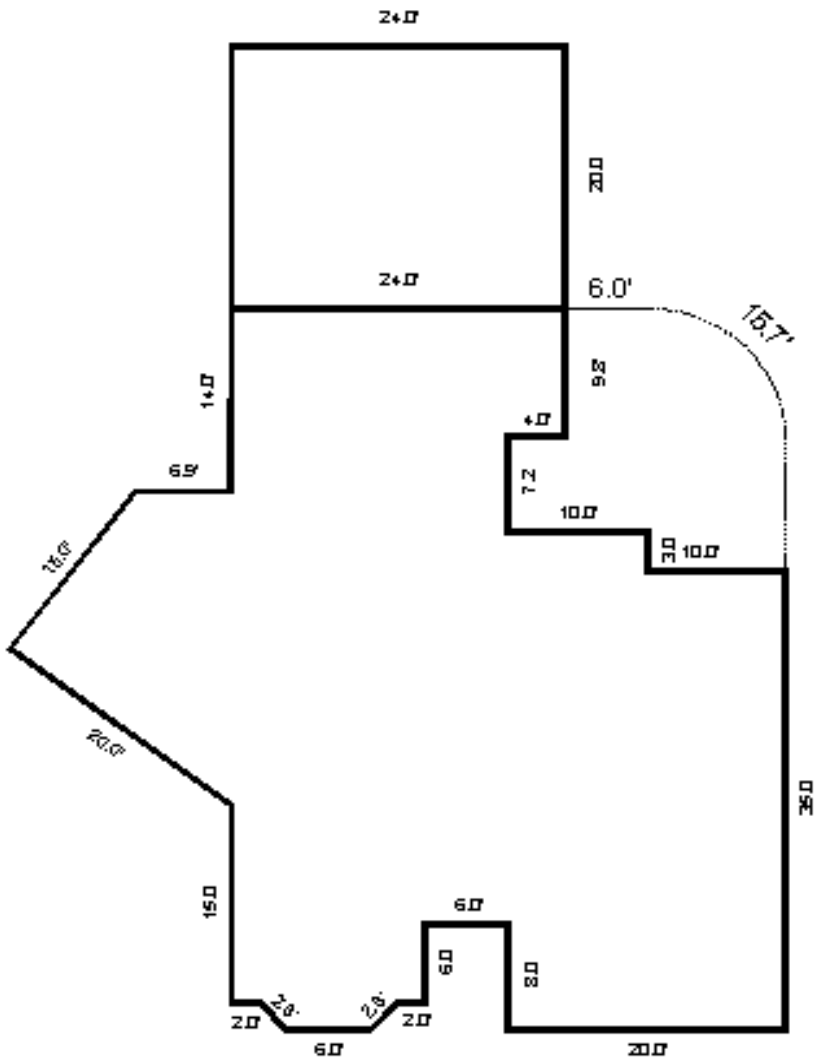


Figure 16 *At this point, your first floor sketch is complete and should look much like this one. By cloning this sketch, you will be able to draw the second floor with ease.*

4. Define the area as a **GLA** (Gross Living Area), and click **OK** to open the Name Area dialog.
5. Select the default name of **Second Floor**, and click **OK** to return to the Drawing Port.
6. Type **45**, press [→], and press [ENTER] to anchor the new area to the right of the first floor.

At this point, your sketch should look like the one in **Figure 18**.

Editing the Second Floor

Next, we will edit the second floor to remove the "wing" area of the sketch. Complete the following steps to accomplish this.

1. Press [DEL], which will cause the Select Area dialog to pop open on the screen.
2. The Select Area dialog will ask you if you would like to reopen the second floor. Click **Yes**. This will erase the last line of the second floor.
3. Press [DEL] four (4) more times to delete the lines back to the two foot line located just to the left of the bay window.
4. Press [A], and then press [ENTER] to close the area and anchor the 53 foot dimension.
5. Press [C] to center the sketch.

Your sketch should resemble the one in **Figure 19**.

Now, you are ready to add a negative area to the second floor, which will complete your sketch. Pay close attention to the next section, which introduces you to an important concept you must utilize in almost every sketch you will do.

Negative Areas

The second floor of our example property has an area which is open to the area below it. Since this space will not add to the square footage of the Gross Living Area, it must be calculated as a negative area, just as the garage was.

Before adding the "Open to Below" area, however, it is important to understand an important concept. When adding or subtracting from an

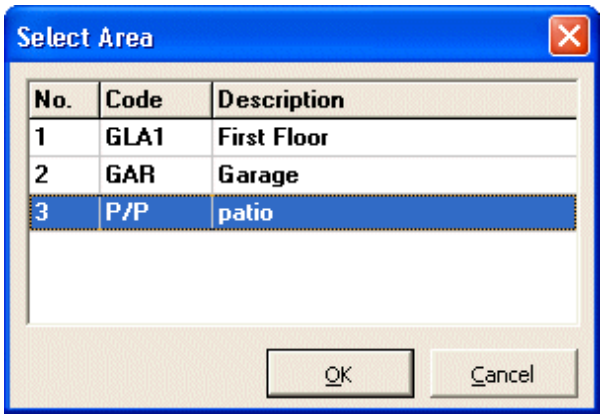


Figure 17 *When you clone an area, the new area will have the same properties as the original. Once you choose an area to clone and click OK, the Define Area dialog will pop up. Any changes to the cloned area's properties should be made there.*

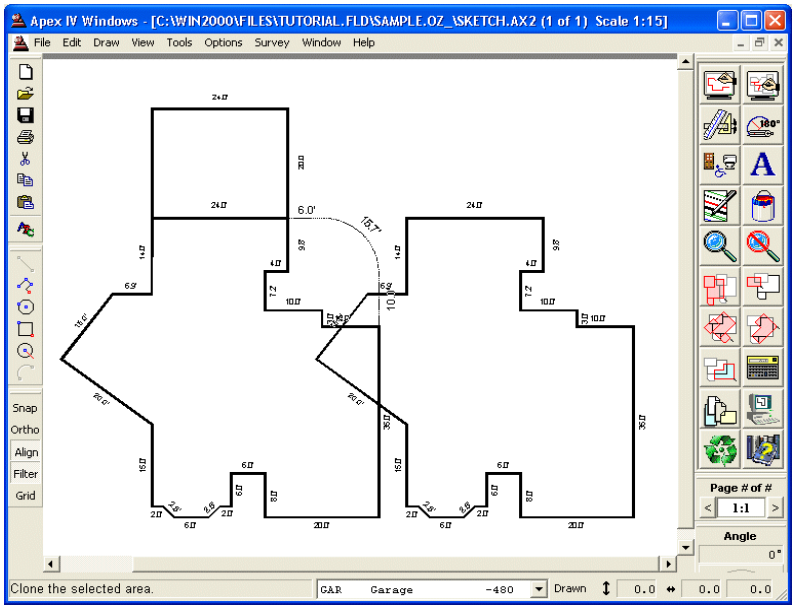


Figure 18

area, *the area types must be alike*. In this example, the area we wish to subtract from is a GLA second floor. Therefore, in order for the calculations to correctly subtract the Open to Below area from the second floor, it must be of the same type when it is defined.

1. Click the Define Area button and define the new area as a **GLA second floor**.
2. Click **OK** to open the Name Area dialog.
3. In the Name input field, you may enter **Open to Below** as the name you wish to display as an area label.
4. **Select the negative radio button** as shown in the example to the right.
5. Click **OK** to return to the Drawing Port.
6. Once you are satisfied with the selections and input you have made, place your cursor near the upper left-hand corner of the second floor and press J to jump to the point where you will begin drawing.
7. Type **24 x 9.8**, and press ENTER twice to complete the procedure.

This completes the sketch. Congratulations! If yours resembles the one in **Figure 21**, you have mastered sketching with Apex IV Windows.

You may "touch up" the sketch to your liking by adding free-form lines to represent interior walls, text to identify various areas on the sketch and icons to represent items within the property and/or to show scale.

Drawing Interior Walls

Now, you can begin drawing interior walls. Unlike the walls you have already drawn, interior walls do not add or subtract from area calculations; they are for the purpose of illustration only. Because of that, you do not have to go through the process of defining an area to begin drawing. Instead, you will simply click the **Free Form** lines button, located to the right of the Define Area button. The Free Form button looks like the one to the right.

Free Form lines are not only used to draw interior walls, but can be generally used to show other miscellaneous non-calculated items such as fence lines, sidewalks, driveways, etc.

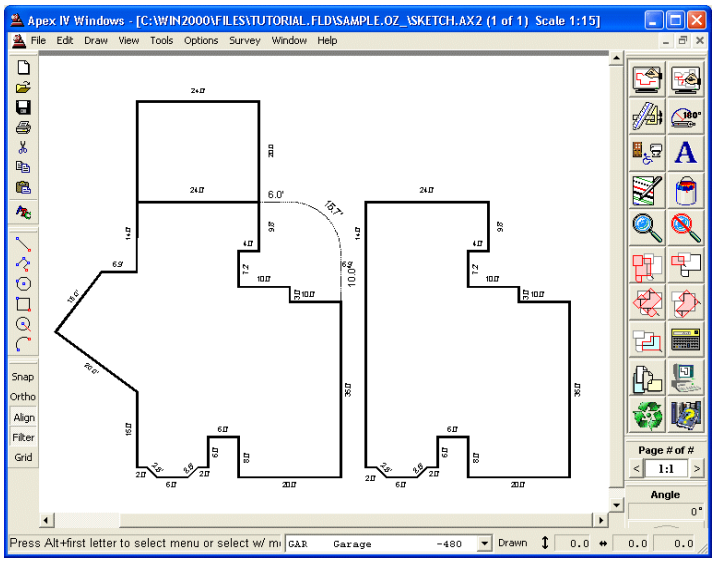


Figure 19

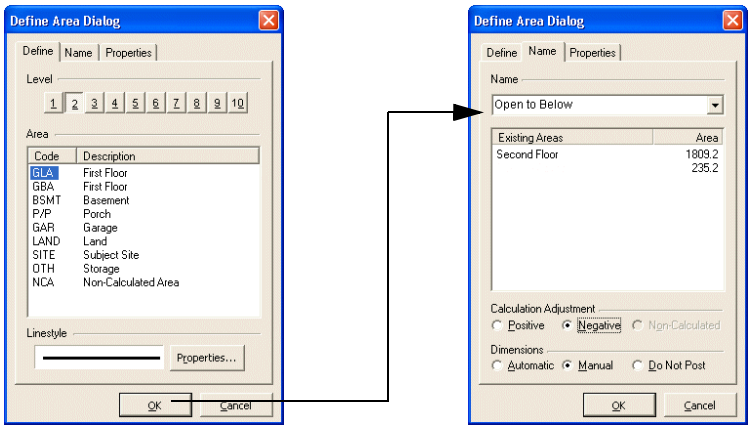


Figure 20 *When adding or subtracting an area, make sure that the area types are alike. In this case, you are adding an area to the second floor which will not add to the GLA's square footage, so it's vital that you choose Negative as your calculation adjustment.*

To begin drawing your interior walls:

1. Click the **Free Form** lines button. “Free Form Mode” should appear in your status line.
2. Place your cursor near the exterior wall where you wish to begin drawing, and press J to Jump to Point.
3. Press ENTER to establish a starting point.
4. Type the length and direction of your line, and press ENTER to place the line.
5. At this point, if you can do one of two things:
   - To continue your drawing without raising your pen, type the length and direction of the next line, and press ENTER .
   - If you need to raise your pen, press ENTER a second time, so you can move it to the next starting point.

   [Note: As you move the cursor, the line length will be displayed, to allow you to make the line the proper length. Cross-hairs will also appear as you come to points with perpendicular lines or corners, to allow you to square your lines with previously drawn lines.]
6. You may have to press the **Refresh** button to see your drawn line.
7. Move your cursor to the next starting point, and begin the process again, until you are finished drawing the interior lines of your property.

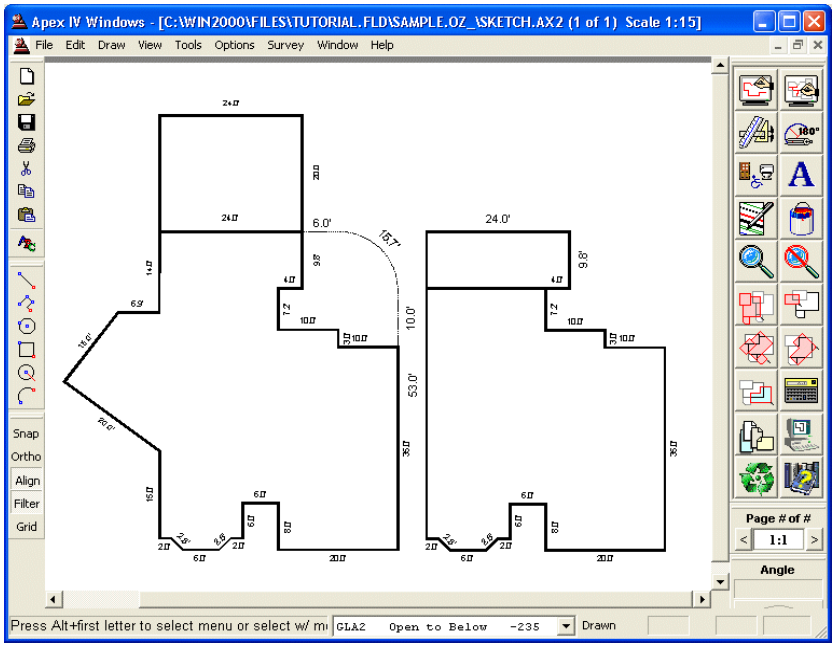


Figure 21 *Now your sketch of the property is complete. At this point, you may add interior walls, icons and identifying text, if you wish.*

Line Edit

If you make any errors drawing your interior lines, you can use the Line Edit function to correct them. Several different methods may be used, depending on what you need to accomplish.

Changing the line style:

1. Select a line, and right-click it.
2. Choose **Properties**.
3. Change the color and/or line thickness, and click **OK**.

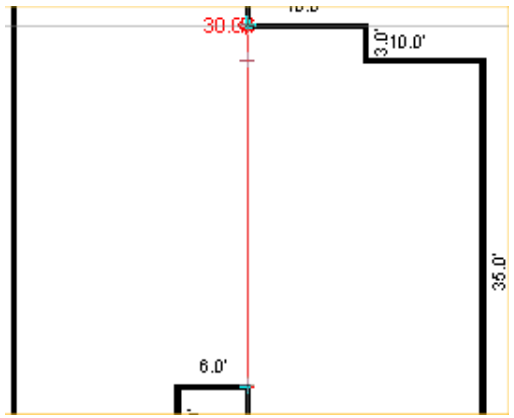


Figure 22 *Notice that the length of the line is displayed as you begin drawing your free-form line. This allows you to place the interior walls to the correct scale. Notice, too, that a + appears as your line crosses an area perpendicular to a previously drawn corner; this makes placing interior lines even easier.*

Changing a line's length after the area is closed:

1. Press CTRL L
2. TAB to the line you wish to edit.
3. Press ENTER .

Adding lines to an existing area (e.g. bay window):

1. Click on **Edit**, and scroll to **Reopen closed area @...**.
2. TAB to the line to edit, and press ENTER .
3. Draw in your window, and then autoclose, using A .

Adding Text

Now that the interior walls have been accurately drawn, we can begin adding text labels to our sketch. Adding text labels is very easy with Apex. The only thing to remember is that you can not add text to an open area. The area must be closed to begin.

1. To add text, simply type T. This will invoke the Text Entry Dialog. (See **Figure 24**.)
2. Choose your text from the Text Library, or type in new text of your own.
3. Click **OK**.
4. The text you chose will now be "attached" to your cursor. Use your cursor to position the text.
5. Click once to place the text in the chosen position.

Text Edit

Once you have placed your text labels, you may edit them in a variety of ways.

Moving text. In case you placed a phrase in the wrong area:

1. Select the text by clicking it. Your text will now be surrounded by four red boxes.
2. Click and hold on the Hotspot. The Hotspot is the blue triangle that appears when you select the text.
3. Move the text, and then release the mouse button.

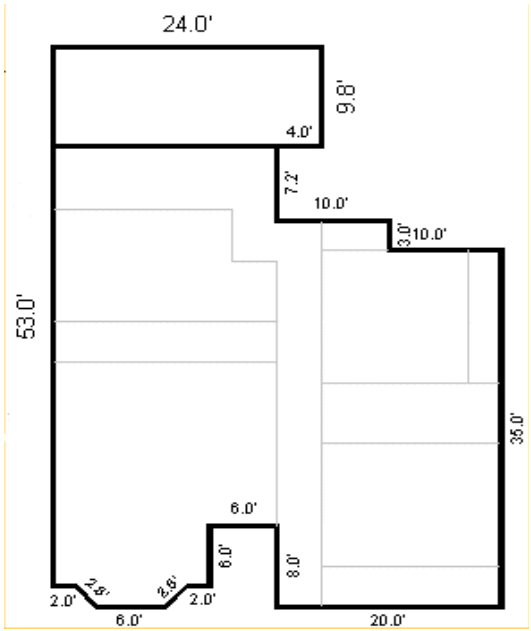


Figure 23 *Once your interior lines are drawn, you may edit them with Line Edit or start adding text and icons.*

Figure 24 *Type in unique text as you go, or choose from the text list. Here, you can also change the font used or edit the list.*

Changing text size:

1. Select the text by clicking it.
2. Click and hold on the Hotspot.
3. Use the + or − to increase or decrease the text size.

Rotating text (There are two ways):

1. Select the text by clicking it.
2. Click and hold on the Hotspot.
3. Simultaneously press R.

-OR-

1. Select the text by clicking it.
2. Click and hold any of the handles (the red squares).
3. Rotate, using your mouse.

Editing text:

1. Select the text by clicking it.
2. Right-click the text.
3. Choose **Properties**.
4. Click **Edit List**.
5. Click **Edit**.
6. Retype word correctly.
7. Click **OK** and then **OK** again to close the window.

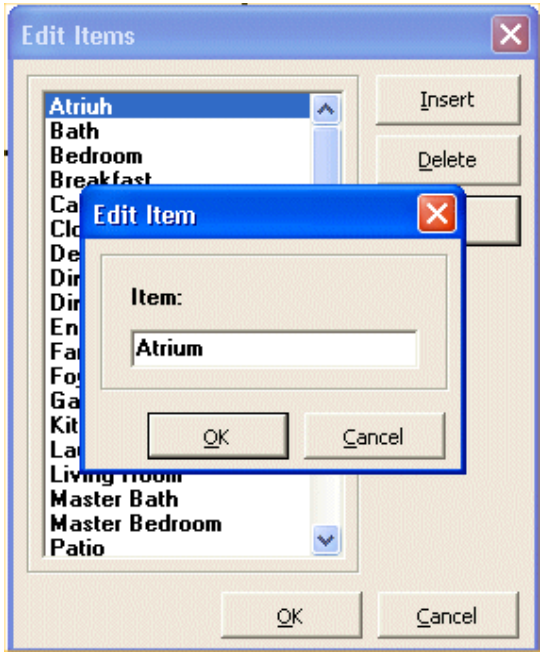


Figure 25 *If a word is misspelled, editing the text takes only a few clicks.*

Adding Icons

Icons are used to place doors, windows, and other miscellaneous items on your sketch; giving it a very professional look.

1. Press I to bring up the **Icon Selection** pallet.
2. Type in the icon name at the top of the window, or scroll through the list to find the icon of your choice.
3. Click **OK**.
4. The icon will now be "attached" to your cursor. Use your cursor to position the icon.
5. Click once to place the icon in the chosen position.

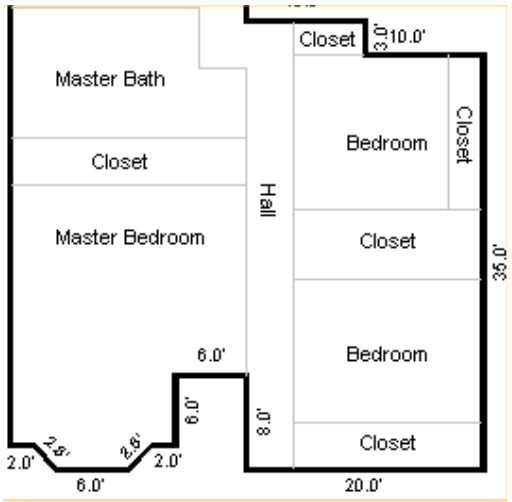


Figure 26 *Once you have the text entered, you can begin to add icons.*

Icon Edit

Once you have placed icons on your sketch, you can edit them in a number of ways.

Moving icons:

1. Select the icon by clicking it.
2. Click and hold the **Hotspot**.
3. Move the icon to its preferred position.
4. Release the mouse button.

Changing icon size:

1. Select the icon by clicking it
2. Hold the **Hotspot**.
3. Use the + or − to increase or decrease the icon size.

Rotating icons (There are two ways):

1. Select the icon by clicking it.
2. Click and hold on the **Hotspot**.
3. Simultaneously press R.

   -OR-

1. Select the icon by clicking it.
2. Click and hold any of the handles (the red squares).
3. Rotate, using your mouse.

Editing icons:

1. Select the icon by clicking it.
2. Right-click the icon.
3. Choose **Properties**. This opens the Size Icon dialog.
4. Enter the preferred dimensions for the icon.
5. Click **OK.**

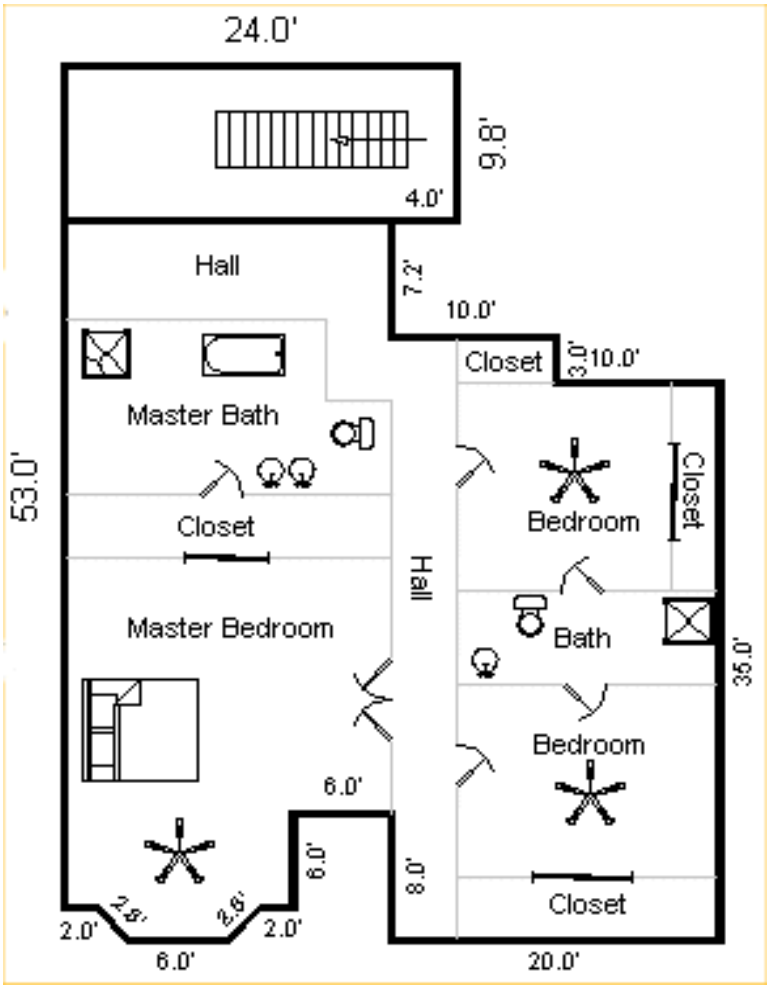


Figure 27 *Finishing touches like interior walls, text labels and icons really spruce up your property sketch, giving it a much more professional look.*

Apex IV Windows
Function Keys

A Auto Close

C Center

F Fill Area

G Goto Corner

I Icons

J Jump to Point

L Line Attributes

M Move Sketch

T Text

U UnZoom

Z Zoom In

F1 Help

F2 Save File

F3 Open File

F4 Define Area

F5 Free Form On/Off

F6 View Calculations

F7 Curve Properties

F8 Alignment On/Off

F10 Refresh Screen

SHIFT I Repeat Last Icon

SHIFT T Repeat Last Text

ALT F4 Exit Apex

CTRL F4 Close Sketch

CTRL F8 Configure Allignment

CTRL F10 Dimension In/Out/Hidden

CTRL A Select All Items

CTRL C Copy

CTRL D Dimension Edit

CTRL F Full Screen

CTRL G Configure Grid

CTRL I Icon Edit

CTRL L Line Edit

CTRL M Move Area

CTRL P Print

CTRL R Rescale Drawing

CTRL T Text Edit

CTRL V Paste

CTRL X Cut

CTRL Z Undo

CTRL F4 Close

CTRL PG UP Change Subj Info

SHIFT CTRL ↑ Pop Up to Line

SHIFT CTRL ↓ Pop Down to Line

SHIFT CTRL → Pop Right to Line

SHIFT CTRL ← Pop Left to Line

CTRL ALT ↑ Allign w/POB Up

CTRL ALT ↓ Allign w/POB Down

CTRL ALT → Allign w/POB Right

CTRL ALT ← Allign w/POB Left

ALT PG UP Scroll Port Up*

ALT PG DN ScrollPort Down*

CTRL ↑ Enhanced Pop Up

CTRL ↓ EnhancedPop Down

CTRL → EnhancedPop Right

CTRL ← EnhancedPop Left

SHIFT F5 Cascade

SHIFT F4 Tile

CTRL F1 Help Index

*Only available when zoomed in

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

Maps PowerView

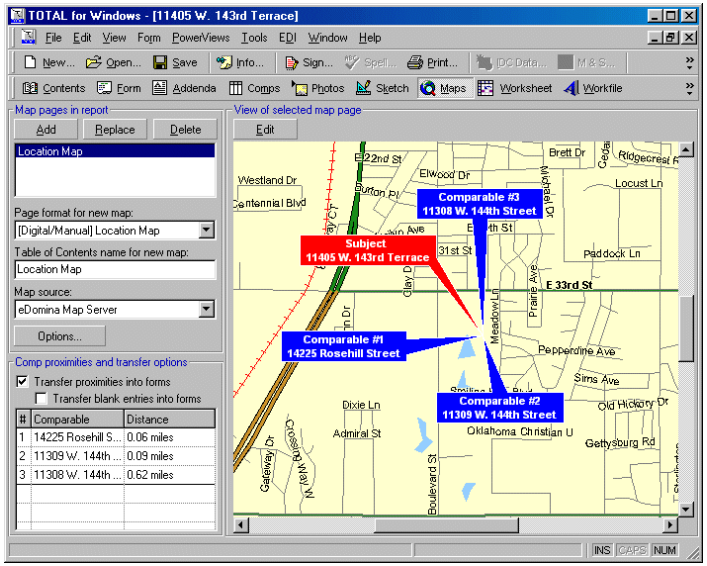
Maps PowerView

All map building functions in one place

This chapter will show you how WinTOTAL automates and removes the common hassles associated with putting together map addenda for your reports.

- This is where you go to download maps through our eDomina server. These maps are completely free when you maintain your annual membership. Since we know the exact elevation of these maps, we can also calculate the proximity to the subject and geocode the addresses.
- Maps from your scanner as well as maps on disk file or copied to the Windows clipboard can also be integrated into WinTOTAL via the Maps PowerView.
- Add annotations such as addresses and icons to any map right on screen - no more expensive rub-ons and no re-typing of addresses.

Maps inserted using the Maps PowerView are automatically copied into the appraisal report and saved with the rest of the appraisal data in one cohesive file.



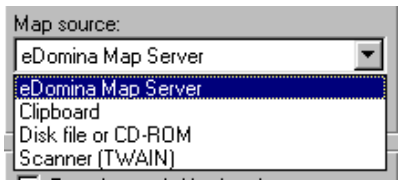
The Maps PowerView makes easy work of digital maps. Just click on the Maps PowerView or select Maps from the PowerView menu.

Using Maps from eDomina.com

Downloading the map

Every day, customers with a current membership and that are using the Professional or Enterprise level of WinTOTAL download thousands of maps through the eDomina service. One of the biggest benefits that these maps are always up to date and more convenient than CD's or scanning. Recent improvements to the resolution and default zoom is bound to make them even more popular.

1. Start with the Page Format and Table of Contents name for the map. These define the default heading for the top of the form and how it is listed in your report's Table of Contents respectively.
2. On the Maps PowerView, click the drop-down list labeled Map Source and choose the item labeled eDomina Map Server.



WinTOTAL can import maps from a variety of sources.

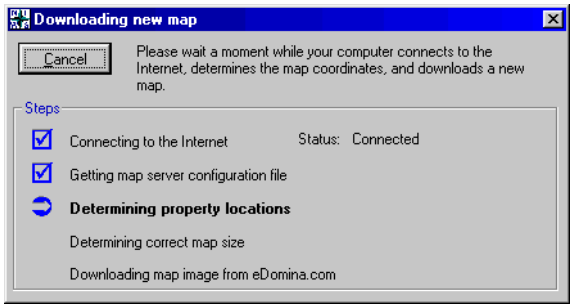
3. WinTOTAL relies on your existing Internet Service Provider's Dial-up Networking Connection to get you connected to the Internet. In most cases, WinTOTAL will even dial and log you in if necessary. (America Online members must typically sign on manually using the America Online software before proceeding.)
4. Click **Add** to insert a new map page into your report. Or, click **Replace** if you are replacing a map on a map page already in your report. (This is handy when you clone and already have the order of your pages set.)
5. Next, you'll be prompted to set the options pertaining to automatically placing the comparables on the map, centering the map on the subject, displaying proximities in the map annotations, detail level of the map and how the proximities are transferred to the form. These should be self-explanatory, but are described in detail on *"Configuring the map options"* on page 8.
6. The first time you download a map, a message will appear regarding geocoding, its benefits, and its advantages. Please take a moment to read this message so you will understand why some addresses are placed accurately and others not. Then, click OK.

Depending on how fast your system connects to the Internet, a map will be downloaded and displayed on your screen along with tools for annotating the map with our Map Palette. You can use these tools in any sequence you wish to customize your addendum.

Map Palette - Address Tab

One feature exclusive to maps downloaded from eDomina is the Address Tab of the Map Palette. Immediately after downloading a map, the Map Palette will appear on screen floating over the map. The Address Tab will be activated to let you know the confidence level of addresses it has marked. You have several options available to you:

- **Add another property.** The **Add a property** button enables you to enter the addresses of other properties such as listings or rentals which are not automatically imported into the Mapping Utility. After adding a new property, it will be sent to our geocoding server and placed on the map just as the other properties were.


Downloading new map
Cancel
Please wait a moment while your computer connects to the Internet, determines the map coordinates, and downloads a new map.
Steps
Connecting to the Internet
Status: Connected
Getting map server configuration file
Determining property locations
Determining correct map size
Downloading map image from eDomina.com

In a matter of seconds, WinTOTAL automatically connects to the Internet and downloads a location map for your subject property.

Table 1: Confidence indicators for addresses automatically

	The green checkmark indicates an exact "hit" for the selected property. The location of the anchor should be accurate, but you will want to verify it.
	The yellow question mark indicates the map server did not find an exact match for the property, but made a best "guess". Often this guess will be on the same street or maybe in the center of the zip code.
	The red x indicates that the map server couldn't even guess the location. *This could be due to the city not being found or items other than city, state and zip entered into the second line of the address.*

- **Edit a property address.** If you notice a property with a question mark or red x is labeled as such because of a typographical error, simply click the property address in the Address Tab and then click **Edit**. At that point, can enter a new address and click **Place**; then see if the property is put on the right place on the map. (We'll discuss moving the balloon a little later.)
- **Move a caption.** If your balloons are overlapping, simply click the text on the balloon and drag it to a new location. Notice the anchor stays in place.
- **Delete a caption.** Simply click the balloon, and then press the DELETE key on your keyboard. You can always replace the caption by clicking the address and then clicking the **Place** button.
- **Reposition an anchor.** If the anchor is in the wrong spot and not pointing close enough to the property, carefully click the anchor point itself and drag it to the correct location. Notice the distance from the subject is automatically updated. Likewise, if you move the subject, all comp proximities are updated.

Map Palette - Position Tab

Click the tab labeled Position for functions that pan your map North, West, East or South as well as zoom in and zoom out. Each time you pan or zoom, a new map is downloaded from the server. However, this map should come across faster than the first one since your addresses are already geocoded.

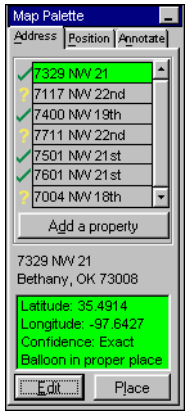
Annotating Maps

The Annotate Tab is where you add lines and icons to your map. You can also add and customize the balloons that denote the properties.

Adding symbols

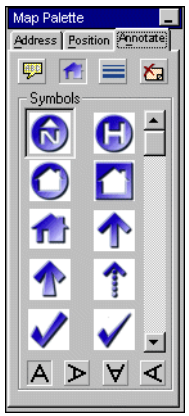
When you first bring up the Annotate Tab, it will be ready for you to place map symbols from our library. Notice you can scroll down this list to get to items such as number labels. Just click the symbol you want to place and then click the map where you want to place it.

- You can delete a symbol placed on your map by clicking it and then pressing the DELETE key on your keyboard.



The Map Palette is a tabbed interface that gives you access to many valuable tools such this one that shows you the confidence level of properties it has placed on your map.

The Position Tab of the Map Palette enables you to pan and zoom once you've found your original map. The smaller buttons indicate zooming in.



The Annotate Tab in the Map Palette enables you to place icons on your map (As shown here) as well as draw lines and place extra text captions.

- Likewise, you can move a symbol placed on your map by clicking and dragging it to a new location.
- To rotate a symbol, click it and then click one of the orientation buttons at the bottom of the Annotate Tab.

Customizing the text balloons

The Annotate Tab of the Map Palette enables you to place your own balloons, change the colors on balloons you've placed and set defaults for future annotations. Click the button that resembles an annotation balloon.

To change the attributes of an annotation balloon: Click the balloon on the map, and then click the button corresponding to the attribute you wish to change. WinTOTAL will remember your changes and if they were associated with the subject, a comparable or a custom annotation. It will then use those attributes the next time it places a symbol.

To add a new annotation:

1. Go to the Balloon section of the Annotate Tab.
2. Click on the map where an annotation doesn't already appear, but in a place you'd like to put one.
3. You'll see a list of properties in your report corresponding to the subject and sales comparables.
4. Mark the property for which you wish to place an annotation, or mark the custom item and type anything you wish to appear on your map.
5. Click OK. Your annotation will be placed on screen. If there was already a balloon corresponding to the property you marked, it will be removed automatically in lieu of your new one.

At that point, you can move the anchor or the balloon as described earlier.

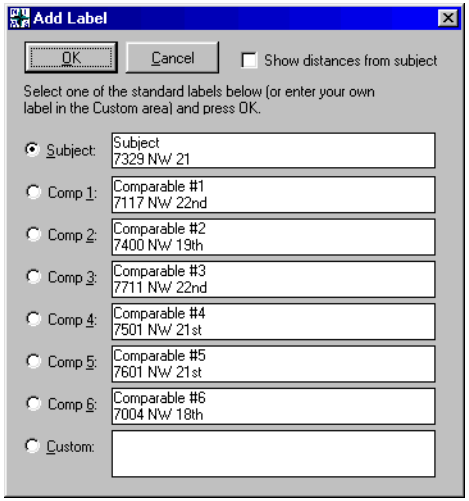
Drawing lines

You can activate our line drawing feature by clicking the line button in the Annotate Tab. This is useful for showing neighborhood boundaries or drawing in new streets.

- Click **Color** to select the color of the line you wish to draw.

The "Balloon" section on the Annotate Tab lets you customize and set defaults for the colors of your text captions.

Just click on the map to place a new text balloon. We save you from having to retype addresses!



- At the bottom of the palette, there is an option for highlighter or marker mode. When in highlighter mode, your line is semi-transparent so that you can see other objects underneath it.

To draw a line:

1. Click the desired line width.
2. Click the starting place on the map and drag your cursor to the end point. When your mouse button is pressed, your pencil is “down” and drawing.
3. Simply let off the mouse button when you are through drawing a particular line. You can then move your cursor to a different position on the map and continue drawing by clicking and dragging.

To modify a line you have already drawn, activate the line tool and then click the line you wish to modify.

- Changing attributes such as the color, width and highlighter/marker mode will modify the currently selected line.
- You can delete the line by clicking the DELETE key on your keyboard or you can even drag the line to another place.

Deleting annotations

We’ve given you a real easy way to clear annotations off without selecting them one by one and using the DELETE. Here’s how you can clear multiple annotations at one time.

1. Click the Delete Annotations button.
2. Mark which types of items you want to clear.
3. Then, click Remove now to permanently remove them.

Using Maps from Other Sources

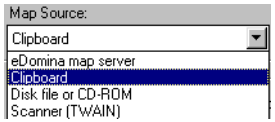
Clipboard and 3rd party CD-ROM programs

If you prefer to get maps from a CD-ROM program, you can use the Windows clipboard as a transfer medium. Before telling WinTOTAL to pull the map image off the clipboard, you have to first copy it to the clipboard. Here’s how.

1. Start your map program as you normally would. You don’t have to exit WinTOTAL. Just minimize it.

Use thick lines to show neighborhood boundaries and thin lines to pencil in new streets that may not be online yet.

CD-ROM based mapping programs typically only export to the clipboard and don’t give a map that will fill up the whole page.

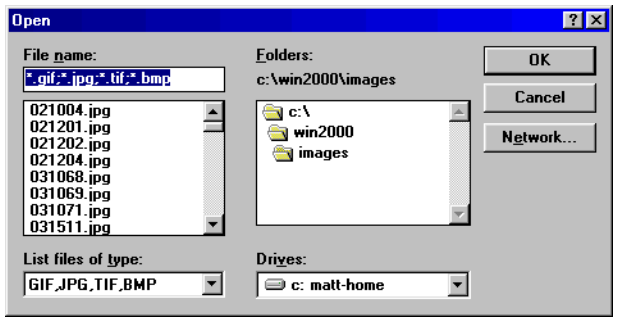


2. Use the CD program's interface to locate the map you wish to use.
3. If you want to use its bundled annotation tools, you may, but WinTOTAL has its own tools that will keep you from having to retype addresses. Plus, you can edit your annotations in WinTOTAL even after you've saved. Of course, WinTOTAL won't be able automatically locate your subject or comps for you since only maps we download are able to be geocoded.
4. Select the **Copy** function from your CD-ROM map program's **Edit** menu. (It might be in another menu. Consult that program's documentation.)
5. Switch back to WinTOTAL and the Maps PowerView.
6. Select the Page Format and Table of Contents name for the map. These define the default heading for the top of the form and how it is listed in your report's Table of Contents respectively.
7. Set your Map Source to **Clipboard**, and click **Add**. Or, click **Replace** if you are replacing an image on an existing page.
8. Your map will appear on screen. Typically, the maps transferred through the clipboard only contain what was on screen when you selected Copy in step 4. That is a limitation of the 3rd party mapping program itself - not WinTOTAL.
9. Now, you are ready to annotate the map as described on *"Annotating Maps"* on page 3. Just click the Annotate Map button.

Using a map saved in a file on disk or CD

Some map programs can export a file to disk. WinTOTAL can read this image into the Maps PowerView, but you have to save the image first or know the file name for which you are looking. Follow the instructions included with your 3rd party program to do so. GIF or PNG images work the best for maps, but you can also use JPEG, TIF and BMP.

1. After you've saved a map image to file, go to the Maps PowerView.
2. Select the Page Format and Table of Contents name for the map. These define the default heading for the top of the form and how it is listed in your report's Table of Contents respectively.
3. Under the Map Source choose the **Disk File** option. Then, click **Add**. Or, click **Replace** if you are replacing a map on a map page already



You may also browse your system for images to use in the maps PowerView.

in your report. (This is handy when you clone and already have the order of your pages set.)

4. A file select dialog will appear for you to browse your system for the image.
5. After finding the file and clicking OK, it will appear in the Maps PowerView where you can annotate it. Just click the Annotate Map button.

Scanning maps and TWAIN

If the map you need to insert in a report isn't available via the Internet or 3rd party program, you can scan it in. TWAIN is a generic way for devices like scanners to interface with programs such as WinTOTAL.

1. Go to the Maps PowerView and select the Page Format and Table of Contents name for the map. These define the default heading for the top of the form and how it is listed in your report's Table of Contents respectively.
2. Click the Map Source drop-down and choose the Scanner option.
3. A button labeled Select Source will appear. The first time you use TWAIN with WinTOTAL, you'll need to click the Select Source button and select your scanner from the list of TWAIN devices that appears. Then, click Select.
4. Click **Add**. Or, click **Replace** if you are replacing a map on a map page already in your report. (This is handy when you clone and already have the order of your pages set.)
5. Your scanner software will start. Scan in the document according to the instructions for your particular scanner. Upon closing the scanner software, the map image will appear in the Maps PowerView.
6. You can then annotate the scanned map by clicking the Annotate Map button.

Tips when scanning maps into WinTOTAL:

- Use Black&White or Line Art settings. (You don't need brilliant colors in a map. They just make your files larger and slower to print or send electronically.)
- Use a low resolution setting of 200dpi or lower. This will keep your file size down and save disk space. The map will still look great. Even 100dpi or "fax" resolution will output good-looking maps.

More options in the Maps PowerView

Enhancing a map

Photo enhancement tools can be useful for scanned images or to brighten map colors so that they use less ink in the printer.

1. In the Maps PowerView, click the map page that contains the image you wish to enhanced.
2. Click the Enhance Map button.
3. Make appropriate adjustments and click OK.

Note: There's no need to convert maps to greyscale since WinTOTAL has functions to send map pages to your laser printer if you take advantage of our dual printing system. Likewise, on inkjet printers, it saves only a negligible about of ink since it causes your inkjet printer to use an amount of black ink equal to what it would have used in color.

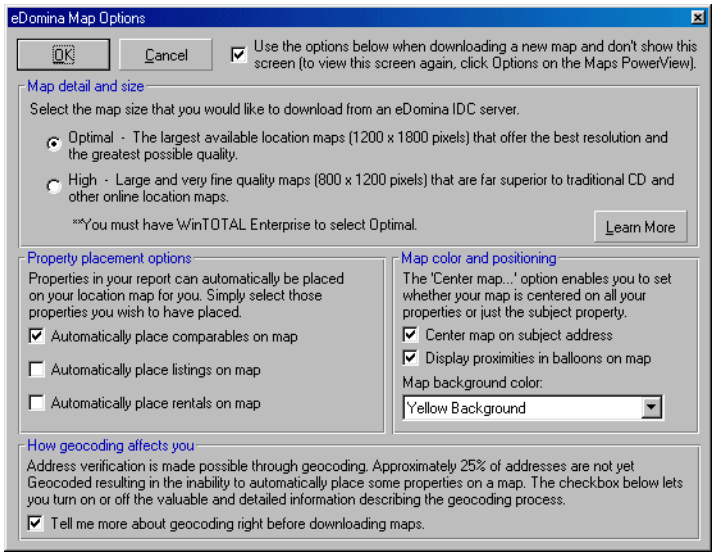
Deleting a page

When you delete a map page through the Maps PowerView, the map image is also removed from the report. If this map was copied from a disk file, the original disk file will not be affected. To delete a map page, just click its description, and then click Delete.

Configuring the map options

You have many options available to you when you download maps through WinTOTAL. Most of these are self explanatory. You can set these before you download or have them come up each time. Click Options in the Maps PowerView to review the configuration.

- **Map detail.** Those with the WinTOTAL Enterprise edition can download higher quality maps. They have over twice the resolution of the regular maps. The only downside is they may take slightly longer to download,
- **Property placement.** Most of the time, you will want WinTOTAL to place the comps. However, if you are in an area that hasn't been geocoded and properties usually aren't found, you may wish to turn this off. You can also turn this option off to troubleshoot mapping issues.
- **Map color and positioning.** Depending on your preference, you may have the map properties centered on the map image and proximity to the subject "as the crow flies" in your annotations. You also may wish to experiment with the different map colors for your own style. Many people change colors based on ink usage and color printing. To this end, WinTOTAL has printing options which let you


eDomina Map Options
OK
Cancel
Use the options below when downloading a new map and don't show this screen (to view this screen again, click Options on the Maps PowerView).
Map detail and size
Select the map size that you would like to download from an eDomina IDC server.
Optimal - The largest available location maps (1200 x 1800 pixels) that offer the best resolution and the greatest possible quality.
High - Large and very fine quality maps (800 x 1200 pixels) that are far superior to traditional CD and other online location maps.
**You must have WinTOTAL Enterprise to select Optimal.
Learn More
Property placement options
Properties in your report can automatically be placed on your location map for you. Simply select those properties you wish to have placed.
Automatically place comparables on map
Automatically place listings on map
Automatically place rentals on map
Map color and positioning
The 'Center map...' option enables you to set whether your map is centered on all your properties or just the subject property.
Center map on subject address
Display proximities in balloons on map
Map background color:
Yellow Background
How geocoding affects you
Address verification is made possible through geocoding. Approximately 25% of addresses are not yet Geocoded resulting in the inability to automatically place some properties on a map. The checkbox below lets you turn on or off the valuable and detailed information describing the geocoding process.
Tell me more about geocoding right before downloading maps.

WinTOTAL's eDomina Map Options will help customize your options for; map quality, property placement options and map color & positioning.

choose whether maps go to your (typically black and while) forms printer or color photo printer.

At the top of this dialog is a checkbox that tells WinTOTAL not to prompt you for these options when downloading maps.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

E&O PowerView

E&O and Graphs PowerViews

The E&O and Graphs PowerViews go hand in hand in ensuring the quality of your reports. These valuable tools, built right into WinTOTAL can indicate potential problems in your reports as well as add credibility to your work. Why not use every advantage at your fingertips? Only WinTOTAL provides you with these valuable features.

E&O PowerView

Guidelines reviewing

Why let errors go out in your reports when WinTOTAL can find many of them for your automatically? The Guidelines Reviewer built into WinTOTAL Pro can check for as many as 1200 different rules.

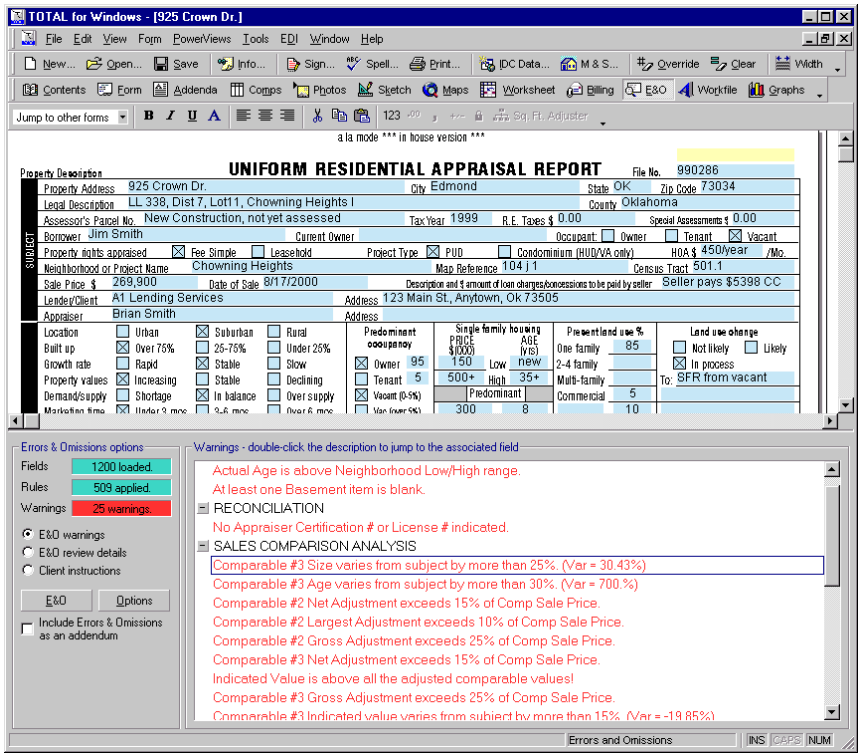
- Finds logic errors in the neighborhood section.
- Finds blank items and when multiple items are checked improperly.
- Compares comps grid against the neighborhood section.
- Has review "scripts" for over a dozen forms such as the URAR, 2055, 2065 704, Condo, SRIPAR and others. These scripts are written in a BASIC-like language and are fully customizable so that you can set rules specific to your office.

Let's load the sample report and run a review.

1. Click on **Open** to start the Appraisal Desktop.
2. Click on the Tutorial Folder, then double click on the sample report. If asked to save changes in your current report, click Yes.
3. Click on the E&O PowerView. You'll see a split screen with the form and review results.
4. Scroll through the output to get a feel for what the guidelines reviewer detects. (We intentionally left errors in the sample.)
5. Notice when you click the errors in the review results, the form places the cursor in the suspect field. This makes it easy to correct problems it finds.

Errors and Omissions Options

The Errors and Omissions Options section provides you the ability to customize this feature to suit your needs.

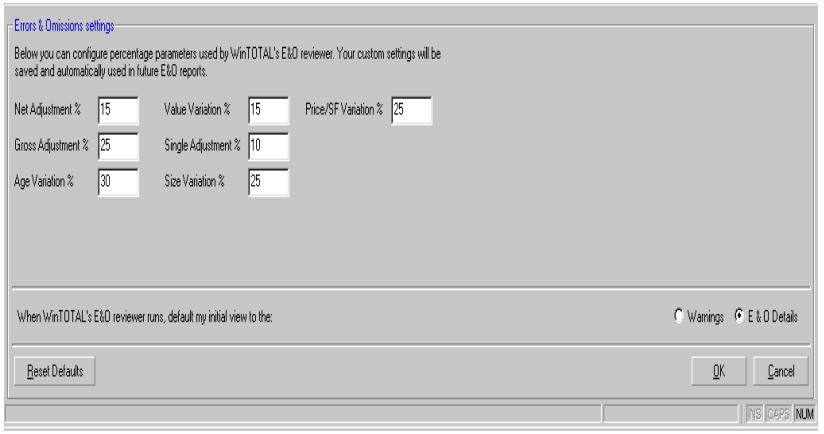

TOTAL for Windows - [925 Crown Dr.]
UNIFORM RESIDENTIAL APPRAISAL REPORT
Errors & Omissions options
Warnings - double-click the description to jump to the associated field
Actual Age is above Neighborhood Low/High range.
At least one Basement item is blank.
RECONCILIATION
No Appraiser Certification # or License # indicated.
SALES COMPARISON ANALYSIS
Comparable #3 Size varies from subject by more than 25%. (Var = 30.43%)
Comparable #3 Age varies from subject by more than 30%. (Var = 700.%)
Comparable #2 Net Adjustment exceeds 15% of Comp Sale Price.
Comparable #2 Largest Adjustment exceeds 10% of Comp Sale Price.
Comparable #2 Gross Adjustment exceeds 25% of Comp Sale Price.
Comparable #3 Net Adjustment exceeds 15% of Comp Sale Price.
Indicated Value is above all the adjusted comparable values!
Comparable #3 Gross Adjustment exceeds 25% of Comp Sale Price.

Our E&O PowerView runs an extensive list of checks on your reports. Not only does it find missing entries, it finds inconsistencies in logic and standard guidelines. When you tell it to view Warnings Only, you can even click one of the items and have it jump to the form so you can make a correction.

- You can view the data in review format, as well as including the review in your report as a supplemental addendum
- You can view the warnings only - and double-click the description to jump to the associated field

You can also configure the following percentage parameters to be used by WinTOTAL's E&O reviewer.

- Net adjustment
- Gross adjustment
- Age variation
- Value variation
- Single adjustment
- Size variation
- Price/SF variation



You can customize the percentages the E&O module uses when reporting errors.

Graphs PowerView

Demonstrates differences and similarities

Just like the E&O PowerView, the Graphs PowerView can help sort out inconsistencies in your reports. The graphs can also be useful for supporting value conclusions.

To access the Graphs PowerView from within your report, click **PowerViews**. Then, select **Graphs** from the pull-down menu.

Your subject versus comparables graph will display for the comparison option you select on-screen. You can choose from the following comparison options.

- Price
- Price per SF
- Indicated value
- Indicated value per SF
- Size
- Age
- Weight

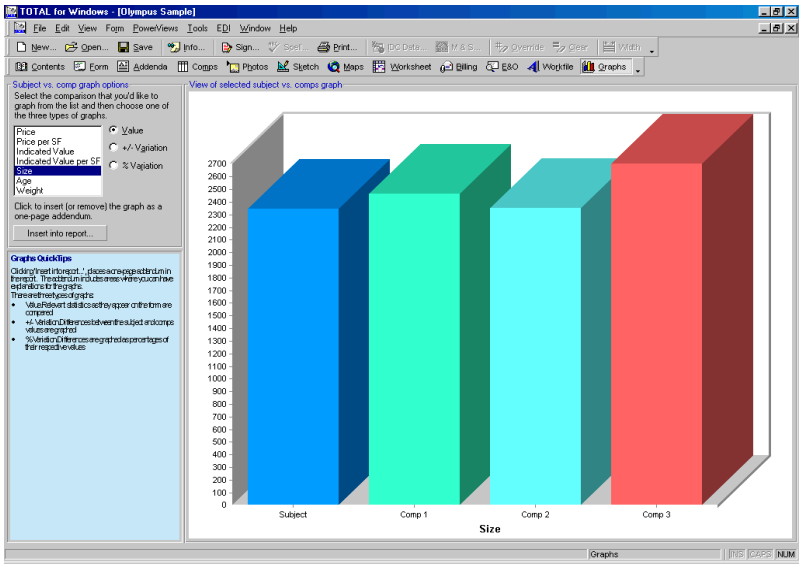
You can also choose to graph the options above by value, % variation you set, or +/- variation you set on your reports. You make your selection by clicking the appropriate radio button.

Insert a graph into a report

You can add the graph by clicking the **Insert into report...** button. Should you decide the graph is not needed, you can remove it from your report easily. Simply open the report, click the Jump to other forms pull-down menu and select Review Graph. Then, just click the **Remove from report...** button.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.



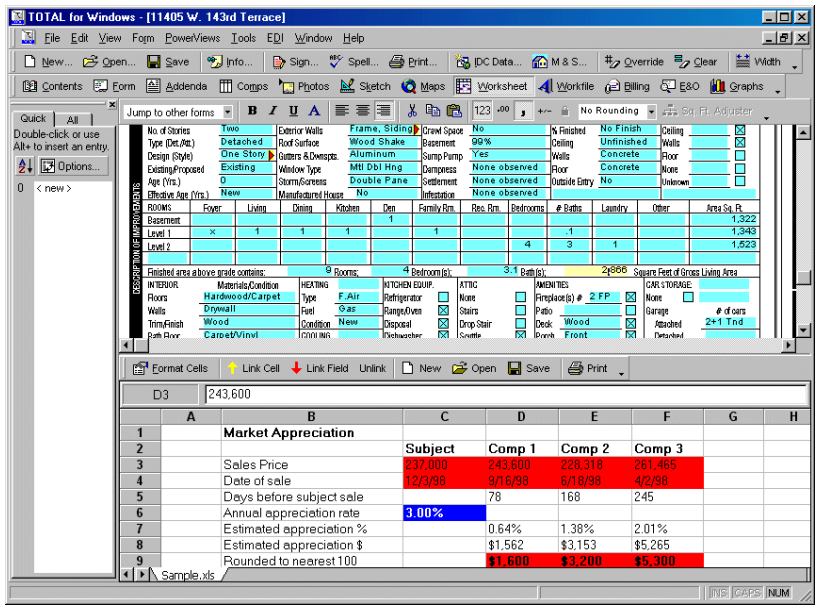
The Graphs PowerView provides a powerful visual representation of selected key information contained in your report.

Worksheet PowerView

Worksheet PowerView

The Worksheet PowerView provides you spreadsheet functions right inside your appraisal report. This allows you to set up your own custom calculations inside forms. Therefore, if you have a different way of doing the math or wish to add math in a form, you can write worksheet formulas to do so here. The formulas could be actual arithmetic or they could be functions that copy the data from field to another.

Our Worksheet PowerView even reads spreadsheets saved from Microsoft Excel. Therefore, if you are familiar with spreadsheets and already have some of your own outside of WinTOTAL, then you'll be up and running in no time with this.



The Worksheet PowerView incorporates "live" spreadsheets into your appraisal reports letting you set up models for the calculations in a report. They're compatible with MS Excel too!

Worksheet Basics

What is a worksheet / spreadsheet

A worksheet is a tool that enables you to set up formulas and models for calculations. A calculator typcially only lets you do one calculation at a time, but a worksheet enables you to change an entire page of calculations by adjusting just one factor.

- Individual elements are called "cells".
- Cells are referenced by row number and column letter.
- Cells can contain text, numbers or formulas.
- Functions can take the contents of one or more cells and perform math calculations or other functions on them.
- For one cell to be a function of other cells, the first character needs to be "=" (example: =A1+B1)
- Just like a calculator, operands may be grouped using parenthesis. (example: A1*(B1+C1))
- Changing the information in the source cell automatically updates cells containing formulas based on that cell.

Common math functions

When writing functions in your worksheet, use "=" as the first character in the formula bar. Instead of typing the cell references, simply click in the

cells. When you resume typing your operands, the worksheet will know to put you back in the formula bar.

Add: =A1+A2

Sum: =SUM(A1,A2,A3,B1,B2,B3) or =SUM(A1:3,B1:3)

Multiply: =A1*A2

Divide: =A1/A2

Rounding: =ROUND(9899.435, -2) returns 9900

Condition: =IF(A1>10, “Greater”, “Less”) returns “Greater “if the value of A1 is greater than 10 and “Less” if A1 is less than 10

Handy text functions

To return only rightmost 5 characters: =RIGHT(A1,5)

To concentrate cells and text: =A1&A2

Linking the fields to your forms

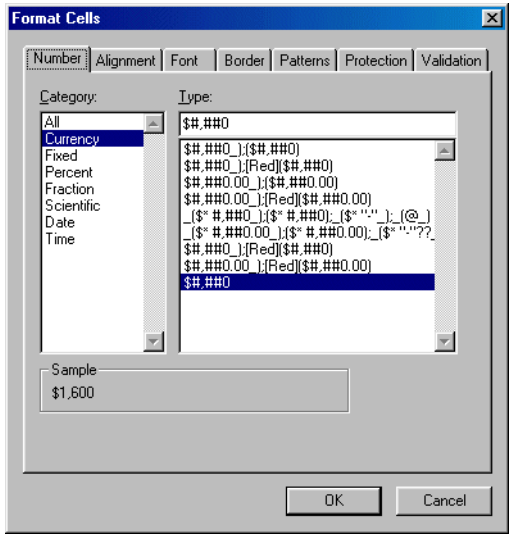
To link a field on the form and field on the worksheet, first click the field on the form and then click in the cell on the spreadsheet.

- Click the yellow “uplink” button if you want to push the contents of the worksheet’s cell into the form.
- Click the red “downlink” button if you want to push the contents of the form into the worksheet.

Use the **Unlink** button to remove the connection between two fields.

Formatting cells

To make your worksheets more readable as well as specify data types, use formatting. Just select the cells you need to customize and click the format cells button.



Formatting assists with presentation as well as defining data types.

The Sample Worksheet

Using a variety of functions

WinTOTAL already has a sample worksheet built into it. It shows a variety of functions and formatting. Here’s how to use it:

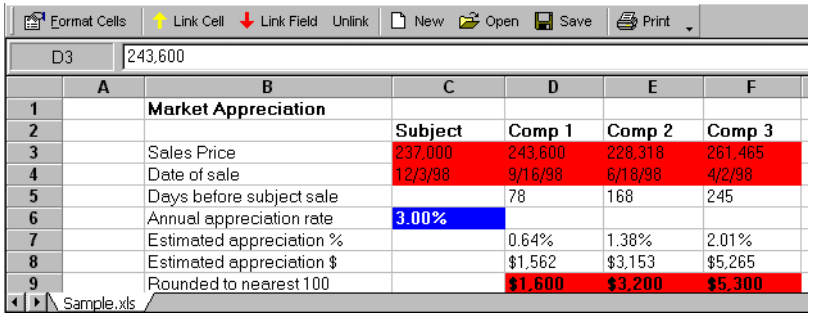
1. Open a URAR report - preferably one that you don’t mind using as a test file. Make sure the sales comparison section is filled out.

Worksheet PowerView

1. Click on the Worksheet PowerView. You'll notice your screen splits.
2. Click Open in the WorkSheet PowerView to get to our sample.
3. Double click the WRKSHEET subfolder and then double click SAMPLE.XLS.
4. You may be receive a message regarding existing worksheets being cleared. Click OK. You'll see our sample load.
5. The equations in this worksheet are tied to fields in the sales comparison section. So, simply scroll to the comps grid.
6. The yellow fields on the worksheet indicate information that is being pushed back up into the form. Click on one of the yellow worksheet fields and notice the active field on the appraisal form switches to the field linked to that cell on the spreadsheet.
7. The red fields on the worksheet are places where data is being read from the form into the worksheet. Click on a red field and the cursor on the appraisal form will jump to its source.
8. The blue fields on our sample worksheet are colored blue simply to point out that is where you can change parameters for the calculations. We did this with the formatting options.
9. If the sale date, sale price, and room counts aren't filled for your subject, enter data in those fields now.
10. As you enter data in those fields, notice how it triggers the calculations in the Worksheet PowerView. The sample has equations to trigger automatic adjustments based on sale date and differences in the room count.
11. Click on the worksheet and enter a different yearly appreciation rate and see how the adjustments in the comps grid changes in both the worksheet and the form.

The worksheet in the sample is just that, a sample. You can add your own calculations to a worksheet and link it with any field of any form.

- The top of the worksheet calculates the days between the subject and comps sale and estimates appreciation based on an annual rate.
- Similarly, you can do automatic room adjustments by assigning values based on differences in the number of bedrooms and baths.



	A	B	C	D	E	F
1		**Market Appreciation**				
2			**Subject**	**Comp 1**	**Comp 2**	**Comp 3**
3		Sales Price	237,000	243,600	228,318	261,465
4		Date of sale	12/3/98	9/16/98	6/18/98	4/2/98
5		Days before subject sale		78	168	245
6		Annual appreciation rate	**3.00%**			
7		Estimated appreciation %		0.64%	1.38%	2.01%
8		Estimated appreciation $		$1,562	$3,153	$5,265
9		Rounded to nearest 100		**$1,600**	**$3,200**	**$5,300**

The sample worksheet shows an interesting formula for calculating a time adjustment. It demonstrates how to use cell formatting to in conjunction with arithmetic to find the number of days between the subject and comp sale.

Worksheet PowerView

Creating Your Own Worksheets

Become familiar with spreadsheet functions

In this context, we can't teach you how to use a spreadsheet and our technicians realistically can't go over fine details of spreadsheet functions on the phone. Basically, you should use our worksheet as you would MS Excel or Lotus. There are dozens of books and videos that can teach you spreadsheet functions. We highly recommend them.

Example: Add two cells together:

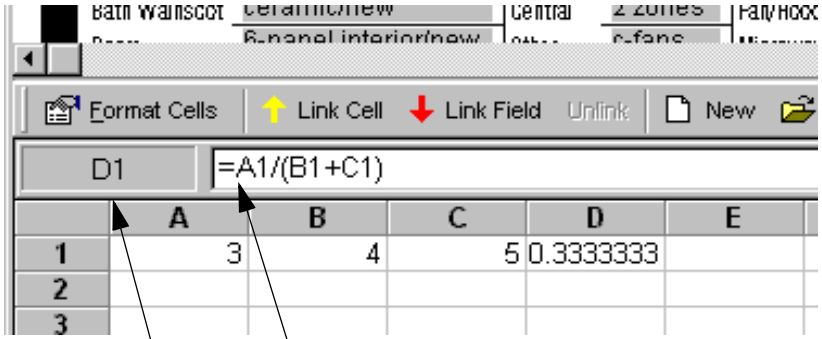
Start with numbers in cells A1 and B1.

1. Click in the cell that is to contain the result - say C1.
2. In the formula bar, type an = sign.
3. Click in the cell that contains the first item you wish to include in the sum. You'll see its cell reference appear in the formula bar.
4. Click in the formula bar and type a + sign after the cell reference.
5. Click in the cell that contains the second item to add. You should now see =A1+B1 in the formula bar.
6. Press ENTER.

Example: Transfer sales comparison value to final reconciliation

Here is a way to make the indicated value by the sales approach transfer into your final reconciliation.

1. Open a report to the URAR and click on the Worksheet PowerTab. The screen will split to shoe the form on top and the worksheet on the bottom.
2. In the Sales Comparison Analysis, on page 2 of the URAR, click inside the Indicated value by Sales Comparison Approach field.
3. Now click in the cell A1 and click the "Link down" button. Cell A-1 will turn red and have data that field's data copied to it..
4. Click in cell B1. While cell B1 is selected click inside the formula bar.
5. Inside the formula bar press the equal [=] key.
6. Now click icell A1, =A1 will appear in the formula bar, and press ENTER.
7. Now click back in cell B-1.



Type formuals into the formula bar. This particular formula equals 3/(4+5) or as you can see in cell D1, .3333333.

Shows which cell the formula is used in.

8. On the URAR, still on the second page, within the Reconciliation section, click in the Final Value field.
9. Last, on the Worksheet PowerTab click the Link up button. Cell B1 will turn yellow and have the same data as A1.

The fields are now linked. Any data entered in the Sales Approach, from Sales Comparison Analysis,will transfer automatically to the Final Value in the Reconciliation section.

Create spreadsheets in Excel for WinTOTAL

The worksheets used in WinTOTAL are compatible with MS Excel 2000. It may be easier for you to create your base formulas in Excel since it is an entire application dedicated to creating them.

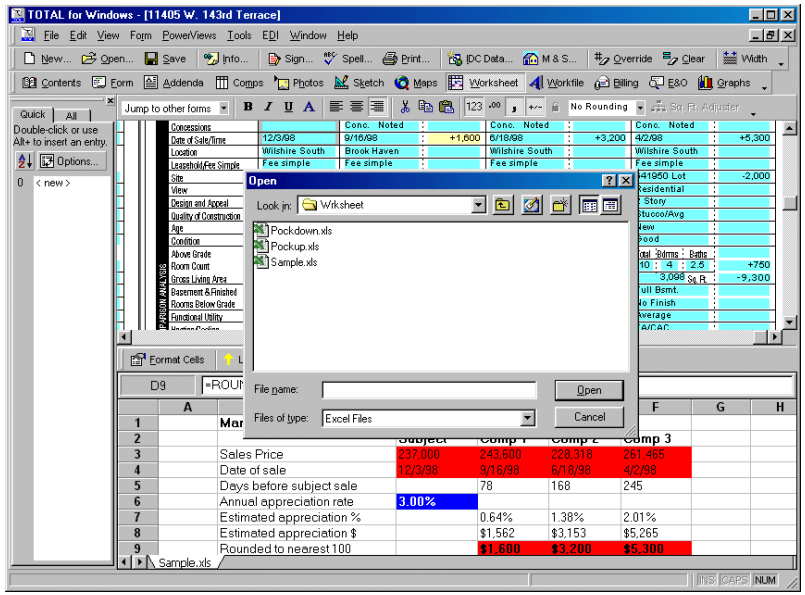
1. Once you've saved a file in Excel, close it.
2. Go back to WinTOTAL's Worksheet PowerView and click Open.
3. Browse to the file you saved and double-click it.

Worksheets can also be copied and pasted from MS Excel.

Saving / loading worksheets

If you've created complex worksheets you don't want to type again, you can click the Save button to keep an external copy of them. WinTOTAL also remembers which fields were linked to the form and saves those in the same directory with a DAT extension.

To load a previously saved worksheet, simply click the Load button and select the file. If a DAT file exists in the same directory, then WinTOTAL will look in it to see if it contains references to field links.



Load presaved worksheets to automatically trigger calculations in forms.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

Internet EDI

Sending and Receiving Reports

WinTOTAL 2000 Pro includes bi-directional Internet communications. It can send and receive orders, reports and status messages as well as download maps and updates to itself. You don't have to know anything about e-mail or attachments. Nor do you have to use your browser separately. It's virtually hands free in its operation. This chapter will cover:

- Configuring WinTOTAL for the Internet
- Sending Reports and Requests
- Receiving Reports and Requests
- Troubleshooting EDI setup

Configuring WinTOTAL's Internet Settings

Get an Internet account first

This chapter assumes that you have already obtained an Internet account through either a local, regional or national Internet Service Provider (ISP). These days, most providers use a standard Dial-Up Networking connection, so if you're on the Internet, just go through the configuration steps below.

- You don't have to be connected when you configure WinTOTAL for EDI, but it will prompt to connect you during the process.
- If you don't have a connection but want to get one, we recommend asking appraisers in your area who they use. If they are happy with service, you may be happy with it too.
- One major provider that, at the time of this writing, still uses a proprietary non-standard connection is America Online. See our troubleshooting section for more details regarding proprietary Internet connections.

Setup WinTOTAL for EDI

WinTOTAL uses the same EDI configuration for all Internet functions including transmitting reports, acquiring maps and receiving program updates. Our Internet EDI Wizard has assisted thousands of appraisers in getting set up on the Internet. It's really easy. As a matter of fact, it

Internet Setup Wizard
WINTOTAL
INTERNET SETUP WIZARD
Select the Internet connection you want to use:
Please select the type of connection WinTOTAL should use to make use of the Internet.
I connect using a modem and phone line.
This will connect to your Internet Service Provider with a Dial-Up Networking connection over a modem.
I connect using a Local Area Network (or LAN)
If you have a permanent connection to the Internet over a LAN, NOT through a modem, choose this option.
< Back
Next >
Cancel

The WinTOTAL Internet Setup Wizard simplifies your EDI configuration. And WinTOTAL's EDI tools make the keep the process even more easy to follow from there. No wonder more appraisals are transferred every day using WinTOTAL over other competing packages.

Internet EDI

takes longer to describe than it does to just do it! There are three places where your EDI can be configured:

- **During WinTOTAL's intial installation.** a screen in the installation wizard will prompt you to set up WinTOTAL's internet tools. Click **Internet** to begin the Internet Wizard.
- **In a report.** Click the **EDI** menu and click **Configure Internet EDI...**
- **In the Appraisal Desktop.** Click the **EDI Center** button and then click **Options**. Then on the EDI tab, click **Internet Setup**.

This brings up our Internet Wizard. Here is how you configure it.

1. The first screen of the Internet Wizard will prompt you as to how you connect to the Internet. Most people connect using a modem and phone line. If your Internet connection is "always on" or you have to sign on before using WinTOTAL's Internet functions, choose the LAN option.
2. Once you've selected the appropriate connection, click **Next** to advance to the next screen in the Wizard.
3. Your connection choice of LAN or Modem in step 2 will determine the next window that pops up.

- If you specified that you connect to the Internet using a modem and a phone line, the Internet Wizard will need to know which Dial-Up Networking connection to use. You should see your ISP in this list. Click on it.
- Click the **User Info** button to enter your login name and password. *Make sure you enter this information correctly!*
- Click the boxes labeled **Save password** and **Don't Prompt** so that the Internet connections will go on behind the scenes. Click **OK** on the *User Info* screen and then proceed by clicking **Next**.

The Internet Setup Wizard will seek out the various connections you have to the Internet. Typically, you'll have just one.

Configure the mailbox

Once our Internet Wizard has determined that you have a valid Internet connection, it will prompt you for items regarding your Internet e-mail. If this is the first time you are running the Internet Wizard, it will prompt you as to which kind of E-mail box you wish to use with WinTOTAL.

- **I want to sign up for a free WinTOTAL 2000 mailbox** - If you want to have WinTOTAL create a new mailbox on our Project 2000 server

*Be sure to click the **User Info** button so that you can enter your username and password. Click in the boxes labeled "Save Password" and "Don't prompt when connecting" so that all Internet connections can go on behind the scenes.*

for you to use, select this option and the Internet Wizard will walk you through creating that mailbox. The accounts we provide to current members do not place restrictions on the size of your messages and they keep appraisal file transmission separate from your personal e-mail.

- **I want to use an existing E-mail account** - If you do not want to use a mailbox on the Project 2000 server, you can choose this option. If you do so, you will need to know your Internet Service Provider's SMTP and POP3 mailbox names.

1. Choose the type of account you wish to configure, and click **Next** to advance to the next screen of the Wizard.
2. On this screen, WinTOTAL needs to know what your Internet e-mail mailbox settings are.

- If you chose to sign up for a WinTOTAL mailbox, these settings will be filled in for you. All you will need to enter is a password for your WinTOTAL mailbox. **Your password must be at least six characters long and is case-sensitive**. When your mailbox is created, you will be faxed a confirmation letter letting you know.
- If you chose to use an existing e-mail account, you will need to put in the appropriate information manually. This information will be included with the registration documentation you got from your ISP.

3. Click **Next** and the Internet Wizard will run a test drive to make sure every entry was entered correctly.
4. If the test drive passes, you'll have an opportunity to set up WinTOTAL for scheduled sending and receiving of EDI. If you regularly conduct business electronically, this option will ensure reports don't wait for delivery or downloading. Click **Schedule EDI** and choose when e-mail and reports will be automatically sent and received.If you don't want to use this option, then just click **Next** and click **Finish**. *Be sure to click **Finish**, or the Wizard will not save your EDI configuration.*

Configuring PDF Security

The Adobe Acrobat PDF format is one of the most popular EDI methods available. The appeal of the PDF is the receiver doesn't need WinTOTAL to view or print the report - they only need a freeware reader supplied by

Internet Setup Wizard
WINTOTAL
INTERNET SETUP WIZARD
Configure WinTOTAL Internet mail
If you chose to use our free account, the first four fields will be filled in correctly. If you're using your own account, you'll need to fill these in. Your Internet Service Provider will know these answers if you don't, and probably provided that information to you on a sheet or printout when you signed up.
Your name:
Matt Krodel
E-mail address (for example, "dave@proj2000.com"):
8002526633@proj2000.com
SMTP Mail Server name (for example, "mail.proj2000.com"):
smtp.proj2000.com
POP3 Mail Server name (for example, "mail.proj2000.com"):
mail.proj2000.com
POP3 Account (usually the same as your e-mail name):
8002526633
Please pick a password for your POP3 Account:
Please re-enter your POP3 Account Password:
Your fax number (required for account activation)
405
359
8612
Clear Mailbox
< Back
Next >
Cancel

Each month, thousands of appraisers send appraisal reports through our EDI server with a combined throughput exceeding 1.5 gigabytes per day and climing.

Internet EDI

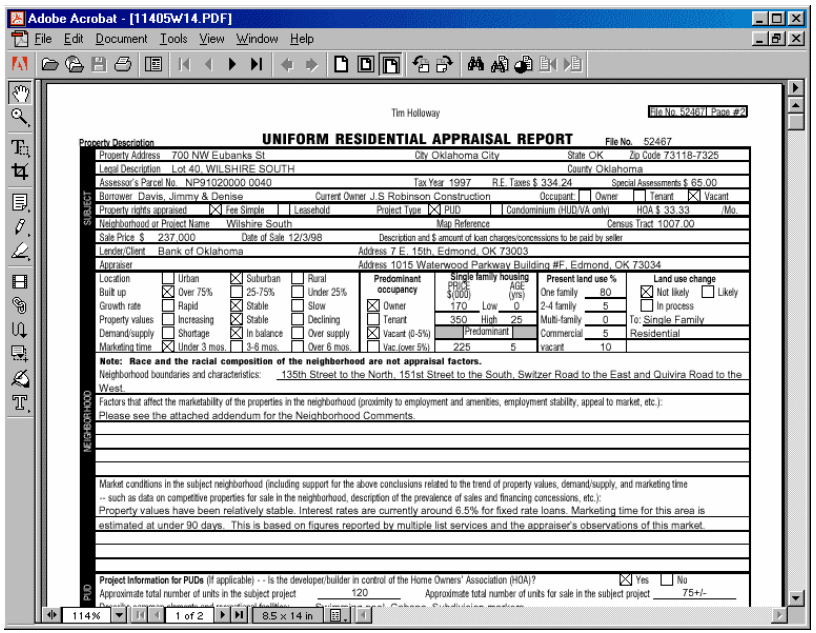
Adobe Systems, Inc. To get a hard copy of the report, the receiver can simply open the report file from the e-mail message and print it directly from the Acrobat Reader application.

If you have not separately purchased and installed the Adobe Acrobat PDF creation software, the PDF option will not be available.

WinTOTAL has unequaled PDF integration. Not only do we reduce the number of steps it takes to send the EDI file, we give you easy access to Acrobat's security settings. Even if you've been using the PDF for some time, Athena takes better advantage of of security options in Acrobat 4.0 and later. Please follow the steps in this section.

Since creating a PDF from your appraisal is actually a "printing" process, we're going to go into WinTOTAL's print setup to make changes. Once you set this up on your system, you won't have to do it again.

1. Click WinTOTAL's File menu and choose Print Setup.
2. Click the tab labeled PDF/General Settings and Security.
3. This is where we tell WinTOTAL which "printer" actually creates PDF documents. You may have two different Acrobat printers on your system. Older versions of WinTOTAL used the "quickie" PDFWriter driver which didn't automate any secuity settings. Athena can use the Acrobat Distiller driver which is preferred. Click "Select PDF Printer".
4. Scroll through the list of printers installed on your system until you get to the one labeled "Distiller". (Your system may be set for PDF Writer. You'll need to change it.) Choose that "printer" and click OK.
5. Unless you have a specific need to change it, leave the output directory at its default.
6. Click PDF Security Settings.
7. This is where you can set options that limit what the recipient can do to your file without knowing your password. At least leave the printing option turned on!
8. Then, set passwords for opening the document and changing security settings.
9. Click OK on the PDF Security Settings and OK again on the print setup.


Adobe Acrobat - [11405W14.PDF]
File Edit Document Tools View Window Help
UNIFORM RESIDENTIAL APPRAISAL REPORT
Property Address 700 NW Eubanks St
Legal Description Lot 40, WILSHIRE SOUTH
Assessor's Parcel No. NP91020000 0040
Borrower Davis, Jimmy & Denise
Neighborhood or Project Name Wilshire South
Sale Price $ 237,000
Lender/Client Bank of Oklahoma
Appraiser
Neighborhood boundaries and characteristics: 135th Street to the North, 151st Street to the South, Switzer Road to the East and Quivira Road to the West.
Please see the attached addendum for the Neighborhood Comments.
Property values have been relatively stable. Interest rates are currently around 6.5% for fixed rate loans. Marketing time for this area is estimated at under 90 days. This is based on figures reported by multiple list services and the appraiser's observations of this market.
114%
1 of 2
8.5 x 14 in

The PDF format is a view/print only version of a document. WinTOTAL automates the process of sending reports through the Internet in this format. The PDF Reader software is free from its producer, Adobe Systems, Inc. However, Adobe Systems charges for the software that allows you to convert files to a PDF.

Your PDF documents will now go out and not be modifiable.

Sending Reports and Requests

The entire EDI sending process is made up of two parts; marking the report to be sent and the actual sending of the report. You can mark the report while you are in the report or in the File Cabinet. The report can be sent in either the EDI Center or while you are in the report.

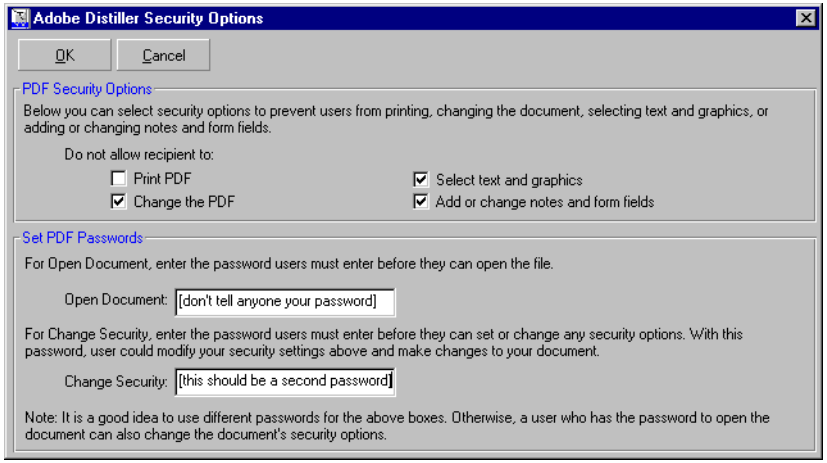
WinTOTAL has multiple methods of sending a report - the native WinTOTAL and Pocket TOTAL formats, and as a PDF document attached to a regular e-mail message. As new standards arise, other methods may be integrated. This chapter will deal with the most common methods - the PDF and native WinTOTAL "ZAP" file.

Sending a view/print only report as a PDF

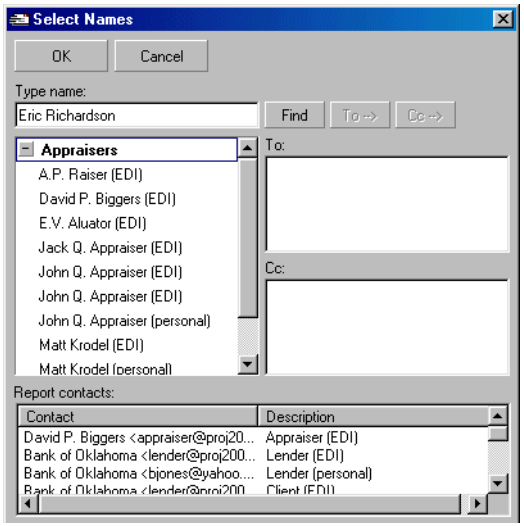
Many programs force you to "print" the PDF separately, then use an e-mail program to attach it manually. While that isn't difficult, our method is even easier. In one step we create the PDF and attach it to a message - we also automate things like the subject line, body text and even make it easier to pick out the recipients.

1. While in the report, click the **EDI** menu and select **Send Report via Internet EDI**. Or, you may send it from the File Cabinet. Simply click on the report you want to send and click **Send EDI**.
2. Enter the e-mail address of the recipient. The *To* field has a drop-down list for you to choose one of the entities from your report. To choose anyone from your Address Book, simply type a name in or click **To...**

- Clicking the **To...** button will bring up another window from which you can choose the receipient. To add a name, simply double click the type of entity in which the receipient is located, ie. if you are sending to an appraiser, double click **Appraisers**. Then double click the receipeint's name to add the name as a receipient and click **OK**.
- To view the actual e-mail address of an entity, single click the entity and then move your mouse pointer to the "Type Name" field until it hovers over the name. It will take a second, but then a window with the e-mail address should pop up.


Adobe Distiller Security Options
OK
Cancel
PDF Security Options
Below you can select security options to prevent users from printing, changing the document, selecting text and graphics, or adding or changing notes and form fields.
Do not allow recipient to:
Print PDF
Change the PDF
Select text and graphics
Add or change notes and form fields
Set PDF Passwords
For Open Document, enter the password users must enter before they can open the file.
Open Document:
[don't tell anyone your password]
For Change Security, enter the password users must enter before they can set or change any security options. With this password, user could modify your security settings above and make changes to your document.
Change Security:
[this should be a second password]
Note: It is a good idea to use different passwords for the above boxes. Otherwise, a user who has the password to open the document can also change the document's security options.

Athena's support for Adobe Distiller security makes it easy to add extra protection to your reports.



The EDI Center pulls the list of e-mail recipients from your WinTOTAL Address Book.

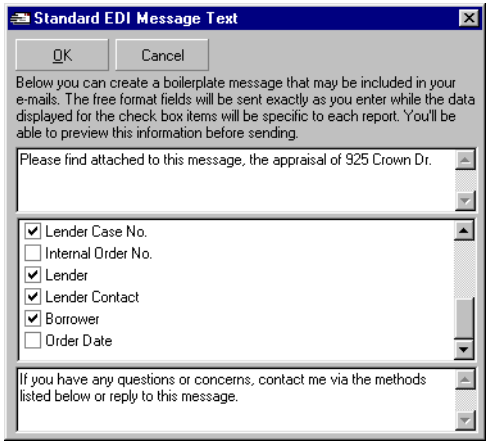
- A copy of the EDI can be sent to an additional receipient by clicking the **Cc...** button and choosing a recipient.

3. Select the **PDF** format for sending the report. Once you use a particular format for an Address Book entry, WinTOTAL will remember that format for the next time you send something to them.
4. Since this message is going to show up in someone's "Inbox", you need to enter a subject line and message text as well as specify a meaningful name for the PDF attachment. You may type in free form text just as you would a regular e-mail message. However, we have some automated functions for you to speed things up.

- The drop-down for the PDF File Name has the description and address. However, you can also click in that box and type anything you wish. The PDF extension isn't necessary. WinTOTAL will add it.
- The first box labeled "Edit message text" denotes skeleton text to go with your message. Click the Edit button and you'll also see we let you merge in data from your report between a message of your choice.
- The "Include signature text" option lets you put a "tag line" on the end of your message body such as your license number, web site info, etc.. This isn't your digital signature. (Digital signatures are describe in ***"Digital Signatures"*** on page 2.9.

5. Once you have your message text entered, you have two options depending on when you want the report to be sent:

- Click **Send/Receive** to send it instantly.*This will also send any other EDI or messages waiting in the EDI Center's Outbox to be sent.*
- Click **Mark to send** to place it into the *Outbox* in the EDI Center. This will enable you to mark several reports and then send them all at once instead of one at a time. This will be a convience if you are only able to be connected to the internet periodically or at specific times of the day. The report will be delivered the next time WinTOTAL connects to the Internet. This is done manually by choosing **Send/ Receive all Internet EDI** from the **EDI** menu, when your regularly scheduled connection occurs as specified in your EDI setup, or by clicking the **Send/Receive** button in the EDI Center.


Standard EDI Message Text
OK
Cancel
Below you can create a boilerplate message that may be included in your e-mails. The free format fields will be sent exactly as you enter while the data displayed for the check box items will be specific to each report. You'll be able to preview this information before sending.
Please find attached to this message, the appraisal of 925 Crown Dr.
Lender Case No.
Internal Order No.
Lender
Lender Contact
Borrower
Order Date
If you have any questions or concerns, contact me via the methods listed below or reply to this message.

WinTOTAL automates the text you include with your EDI.

6. After choosing the option, a print window will pop up. Mark the pages you want to send and configure any print options you need to set. *This happens because the PDF Writer is actually a "print driver" and WinTOTAL "prints" the report using that driver. Instead of coming out of your printer, a disk file is created. WinTOTAL automatically attaches that disk file to an e-mail message and queues it to be sent.*
7. Click OK to complete the "printing" of the file and e-mail creation. The report will be delivered the next time WinTOTAL connects to the Internet. This is done manually by choosing **Send/Receive all Internet EDI** from the **EDI** menu, when your regularly scheduled connection occurs as specified in your EDI setup, or by clicking the **Send/Receive** button in the EDI Center.

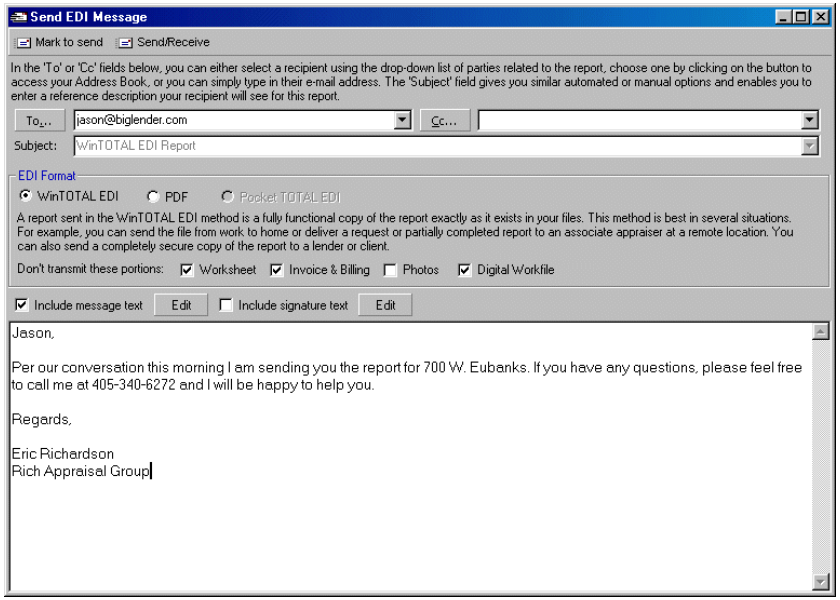
Sending a report file in native WinTOTAL format

This is by far the most automated method and requires the least amount of interaction since WinTOTAL knows how to automatically route files upon receipt to a printer and/or Office Manager folder.

This is useful for inter-office EDI where appraisers work from remote locations. If a digital signature has been applied to a report, it will be read-only and protected from modifications. See ***"Digital Signatures"*** in our ***"Form PowerView"*** chapter.

1. While in the report, click the **EDI** menu and select **Send Report via Internet EDI**, or you may send it from the File Cabinet. Simply click on the report you want to send and click **Send EDI**.
2. The *To* field has a drop-down list for you to choose one of the entities from your repor. To choose anyone from your Address Book, simply type a name in or click **To...**

- Clicking the **To...** button will bring up another window from which you can choose the receipient. To add a name, simply double click the type of entity in which the receipient is located, ie. if you are sending to an appraiser, double click **Appraisers**. Then double click the receipeint's name to add the name as a receipient and click **OK**.
- To find the actually e-mail address of an entity, single click the entity and then move your mouse pointer to the "Type Name" field until it hovers over the name. It will take a second, but then a window with the e-mail address should pop up.


Send EDI Message
Mark to send
Send/Receive
In the 'To' or 'Cc' fields below, you can either select a recipient using the drop-down list of parties related to the report, choose one by clicking on the button to access your Address Book, or you can simply type in their e-mail address. The 'Subject' field gives you similar automated or manual options and enables you to enter a reference description your recipient will see for this report.
To...
jason@biglender.com
Cc...
Subject:
WinTOTAL EDI Report
EDI Format
WinTOTAL EDI
PDF
Pocket TOTAL EDI
A report sent in the WinTOTAL EDI method is a fully functional copy of the report exactly as it exists in your files. This method is best in several situations. For example, you can send the file from work to home or deliver a request or partially completed report to an associate appraiser at a remote location. You can also send a completely secure copy of the report to a lender or client.
Don't transmit these portions:
Worksheet
Invoice & Billing
Photos
Digital Workfile
Include message text
Edit
Include signature text
Edit
Jason,
Per our conversation this morning I am sending you the report for 700 W. Eubanks. If you have any questions, please feel free to call me at 405-340-6272 and I will be happy to help you.
Regards,
Eric Richardson
Rich Appraisal Group

WinTOTAL can both send and receive reports and requests in its native format. You can choose selected portions of the report to omit when sending. Naturally, both parties need to be using WinTOTAL with this method; it is useful insituations where one person is reviewing another's work or the file needs to be loaded into WinTOTAL for other reasons.

- A copy of the EDI can be sent to an additional receipient by clicking the **Cc...** button.

3. Select the **WinTOTAL 2000 EDI format** for sending the report. Once you use a particular format for an Address Book entry, WinTOTAL will remember that format for the next time you send something to them.
4. Select the items in the report you wish not to transmit, if any, by placing a checkmark in the appropriate boxes.
5. Now you have two options depending on when you want the report to be sent:

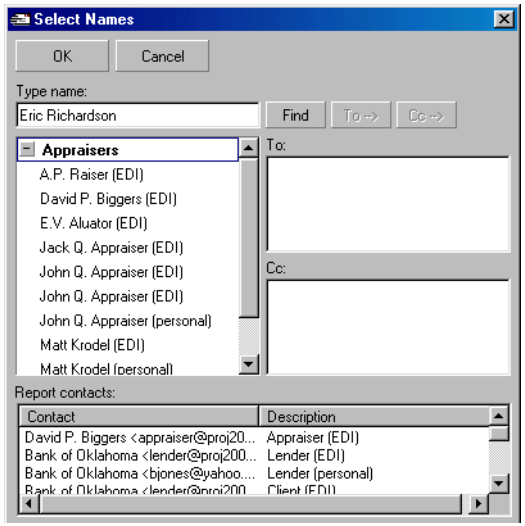
- Click **Send/Receive** to send it instantly.*This will also send any other EDI or messages waiting in the EDI Center's Outbox to be sent.*
- Click **Mark to send** to place it into the *Outbox* in the EDI Center. This will enable you to mark several reports and then send them all at once instead of one at a time. This will be a convience if you are only able to be connected to the internet periodically or at specific times of the day. The report will be delivered the next time WinTOTAL connects to the Internet. This is done manually by choosing **Send/ Receive all Internet EDI** from the **EDI** menu, when your regularly scheduled connection occurs as specified in your EDI setup, or by clicking the **Send/Receive** button in the EDI Center.

Sending a text message or regular e-mail

Regular e-mail can be sent and received in the EDI Center. It has an interface similiar to that of Microsoft Outlook. The EDI Center does simple operations such as sending and receiving e-mail, replying to received e-mail, sending attachments, and fowarding received e-mail.

1. To send a new message in the EDI Center, simply click on the **New** button and it will open a new message.
2. The *To* field has a drop-down list for you to choose one of the entities from your repor. To choose anyone from your Address Book, simply type a name in or click **To...**

- Clicking the **To...** button will bring up another window from which you can choose the receipient. To add a name, simply double click the type of entity in which the receipient is located, ie. if you are sending to an appraiser, double click **Appraisers**. Then double click the receipeint's name to add the name as a receipient and click **OK**.



The EDI Center pulls the list of e-mail recipients from your WinTOTAL Address Book.

- To view the actual e-mail address of an entity, single click the entity and then move your mouse pointer to the "Type Name" field until it hovers over the name. It will take a second, but then a window with the e-mail address should pop up.
- A copy of the EDI can be sent to an additional receipient by clicking the **Cc...** button.

3. If you want to save the e-mail and send it at a later time, click **Save** and the message will be stored in the **Drafts** folder.
4. To attach a file to the message, click the **Attach** button and a "Select files to attach" window will pop up. In this window, you will be able to navigate the folders on your hard drive and open the specific file you want to attach.
5. To send the message, simply click **Send**.

- To reply to a sender that sent you a message, simply highlight the message and click **Reply**. This will create a message that you can treat like a new message.
- A message that was received can be fowarded by clicking **Foward**. This will create a message that you can treat like a new message.

Entering EDI Info for Entities

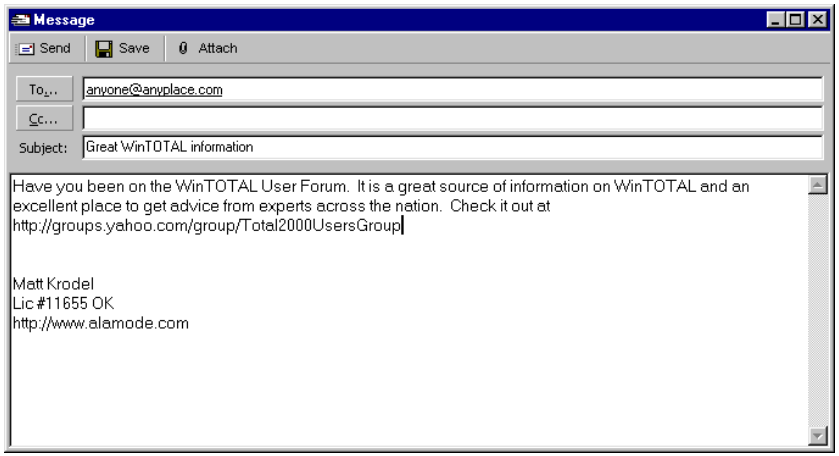
An entity is simply an appraiser, client, lender or other person in your Address Book. You can specify their e-mail address along with their other contact information, so that when you send them a report or request, you don't have to type in their name and e-mail address.

1. In the File Cabinet, click the **Contacts** button and select **All** from the drop down menu. You'll then see a list of all the people in your Address Book.

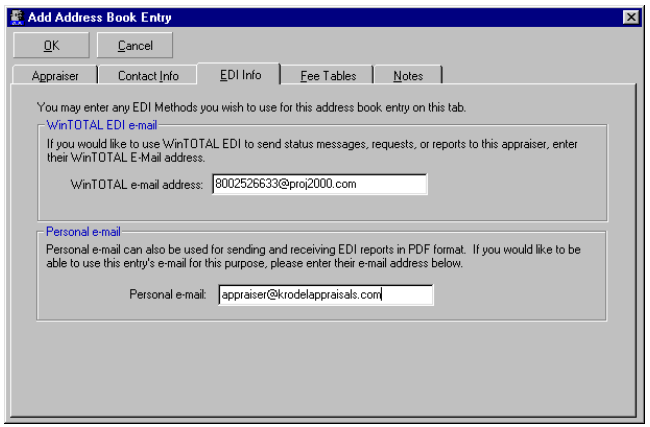
- You can add a new entity by clicking **Add New...** and selecting the type of entity. (You don't have to choose the type of entity when you select a specific entity type from the drop down menu instead of **All**.)
- You may edit an existing entry by highlighting it and clicking **Edit**.

2. After entering the *General* and *Contact Info*, click the **EDI Info** tab.

- Under the *WinTOTAL 2000* section, the *E-mail address* field is the address to which you send appraisal reports in the native WinTOTAL format. If you set yourself up with an e-mail box following the



We simplify your electronic communications by enabling plain text messages to be sent and received through the Appraisal Desktop's EDI Center.


Add Address Book Entry
OK
Cancel
Appraiser
Contact Info
EDI Info
Fee Tables
Notes
You may enter any EDI Methods you wish to use for this address book entry on this tab.
WinTOTAL EDI e-mail
If you would like to use WinTOTAL EDI to send status messages, requests, or reports to this appraiser, enter their WinTOTAL E-Mail address.
WinTOTAL e-mail address:
8002526633@proj2000.com
Personal e-mail
Personal e-mail can also be used for sending and receiving EDI reports in PDF format. If you would like to be able to use this entry's e-mail for this purpose, please enter their e-mail address below.
Personal e-mail:
appraiser@krodelappraisals.com

The EDI Center uses the same Address Book as the Requester, so you only need to enter your contacts one time - in one consistent interface.

instructions at the beginning of this chapter, you would enter this e-mail address in your own record. You'll need to ask your client or other person with whom you're doing EDI for their e-mail address.

- The Site ID field is typically the area code and phone number of the person to whom you are sending. This code is used to create a unique key for each appraisal created.
- The *Personal E-Mail* field is an alternate e-mail address for sending messages that are designed to be downloaded manually, like files in the PDF format.

3. Enter the information in the appropriate fields and click **OK**.

Receiving Reports and Requests

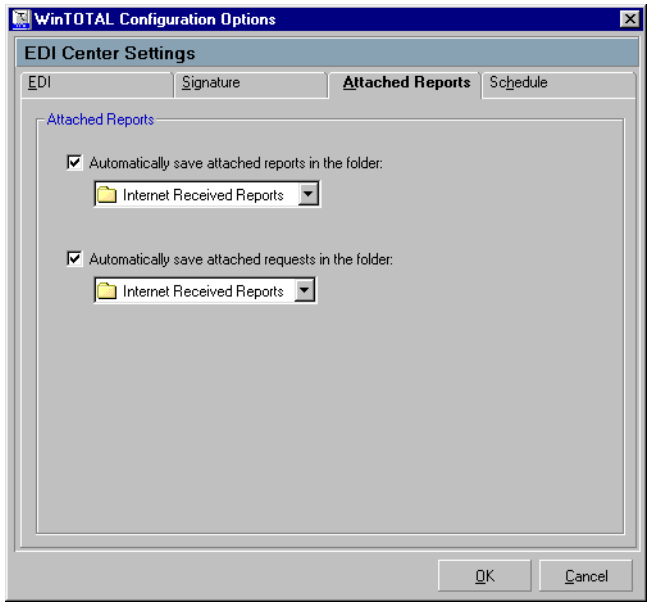
Every time WinTOTAL connects to the Internet for EDI, it does two things: it sends any outgoing reports or messages you've marked to be sent, and it checks your e-mail box for any reports or messages that have been sent to you.

Reports and messages are received into the Inbox in the EDI Center. Reports that are WinTOTAL format can be configured to automatically be placed in a folder in File Cabinet. Reports that are PDF format are received and can be opened in the EDI Center's Inbox. WinTOTAL can also be configured to automatically check for new messages and reports.

Configure the received directory

You can configure WinTOTAL to automatically place reports that you receive, that are WinTOTAL format, into a specific folder in the File Cabinet. These EDI reports will show up in the EDI Center's Inbox and also be placed into a specific folder in the File Cabinet.

1. In the EDI Center, click **Options** and then click the **Attached Reports** tab.
2. You will see here that you can configure where reports and requests are automatically saved. To configure where received reports will be place, place a check in the box to the left of *Automatically save attached reports in the folder.*
3. Then you will be able to choose the folder to which you want the report to be saved by clicking the drop down arrow and choosing a



The EDI Center has "rules" that tell it where to automatically extract native WinTOTAL files when received as attachments. Requests are reports that have never had the "Accepted" status item marked.

folder from the list. Do the same step to configure where requests are saved.

- The default directory that downloaded reports are saved to is the **Internet Received Reports** folder in the File Cabinet. Don't worry about creating this folder; if you don't have it, WinTOTAL will create it for you.
- The default directory that downloaded requests are stored in is the **Received Requests** folder in the File Cabinet. Again, if you don't already have this folder, WinTOTAL will create it for you.

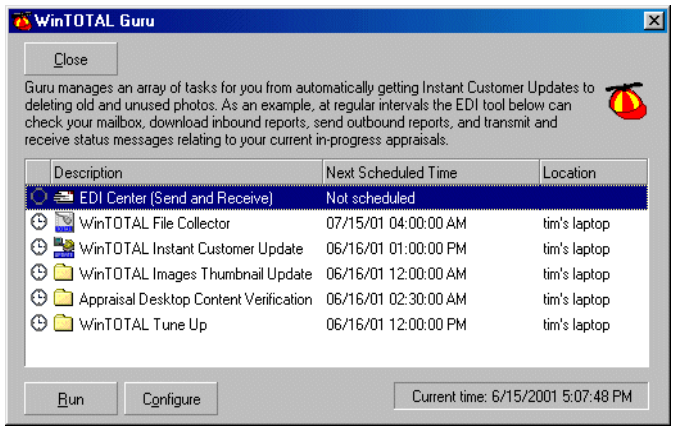
WinTOTAL makes a distinction between a report and request based on the status assigned to a report. To learn more about the differences between a report and a request, please see our ***"Managing Your Files"*** chapter.

Receiving e-mail and EDI in the EDI Center's Inbox

EDI and messages are received in the EDI Center's Inbox. EDI and message can be previewed without even opening the message with the preview pane on the lower left portion of the EDI Center.

1. Click **Send/Receive** in the EDI Center or while you are in a report to receive any EDI or messages that are in your mailbox.
2. Any EDI or messages that are received will show up in the message list section in the upper right portion of the EDI Center.
3. The preview section is located in the lower right portion of the EDI Center and this is where you can preview the highlighted message.
4. You can open a received message simply by double clicking the message in the message list section and this will open the message in a window of it's own.

- If the file contains an attachment, double click the attachment to save the file onto your hard drive. A *Save Attachment* window will pop up and to save the attachment onto your hard drive, simply navigate the folders to the desired directory and click **Save**.
- To print an e-mail message, right-click it and choose Print from the fly-out menu.


WinTOTAL Guru
Close
Guru manages an array of tasks for you from automatically getting Instant Customer Updates to deleting old and unused photos. As an example, at regular intervals the EDI tool below can check your mailbox, download inbound reports, send outbound reports, and transmit and receive status messages relating to your current in-progress appraisals.
Description
Next Scheduled Time
Location
EDI Center (Send and Receive)
Not scheduled
WinTOTAL File Collector
07/15/01 04:00:00 AM
tim's laptop
WinTOTAL Instant Customer Update
06/16/01 01:00:00 PM
tim's laptop
WinTOTAL Images Thumbnail Update
06/16/01 12:00:00 AM
tim's laptop
Appraisal Desktop Content Verification
06/16/01 02:30:00 AM
tim's laptop
WinTOTAL Tune Up
06/16/01 12:00:00 PM
tim's laptop
Run
Configure
Current time: 6/15/2001 5:07:48 PM

The WinTOTAL Guru, which runs in your system tray is responsible for all scheduled tasks - including the periodic EDI send/receive.

Schedule WinTOTAL to automatically send and receive messages

You can configure WinTOTAL to automatically send and receive any EDI or messages that are waiting in your mailbox.

1. In the EDI Center click **Option** and click the **Schedule** tab.
2. Place a check in the *Enable Scheduling* to enable WinTOTAL to automatically send and receive messages.
3. In the choices below *Enable Scheduling*, you can choose how often WinTOTAL sends and receives messages.

Managing Messages in the EDI Center

The EDI Center has a variety of features that will help you organize and manage or e-mail and EDI efficiently. You can delete messages, store messagaes, create folders to organize your messages, and create an e-mail signature.

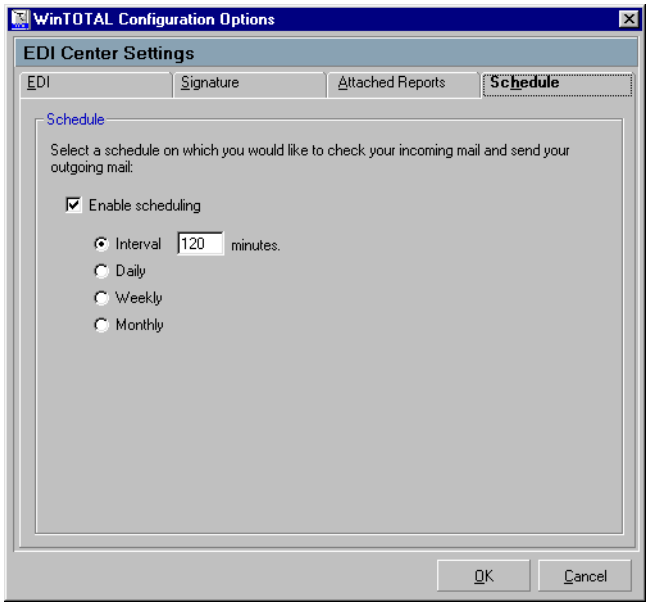
Create a new folder

To create a new folder in the EDI Center, simply click **New Folder**. This feature is handy for organizing and managing messages. Once a new folder is created, you will be able to “drag and drop” an item between folders. To drag an item click and hold the mouse button, and then move your mouse (drag the item) to another folder. When you move the cusor to the folder, simply un-click your mouse and it will “drop” the item into the specific folder.

Special folders in the EDI Center

The EDI Center has a handful of special purpose folders pre-installed.

- **Deleted Items.** When you highlight a message and click **Delete**, the message is moved to the *Deleted Items* folder. Deleted messages will remain in the folder until you right click on the folder and left click **Empty Deleted Items**. *Once a message is placed in this folder, you will not be able to make changes to it, unless you move to another folder.*
- **Drafts.** Any e-mail that you have not finished and want to save will be stored in the *Drafts* folder. If, after starting a messages, you click the **X** button in the upper right hand corner of the message, you will be



Since WinTOTAL can send and receive all types of e-mail, you should configure it to check periodically. It does all the work of connecting to your ISP, checking your inbox and disconnecting behind the scenes.

prompted to save the message. If you choose **Yes**, then the message will be saved in the *Drafts* folder.

At any time, you can open this message by clicking on the *Drafts* folder and then double clicking the message. You can then treat this as a new message and resume typing where you left off.

- **Outbox.** All text messages and EDI reports that are "marked to be sent" are placed in the *Outbox* folder until the **Send/Receive** button is clicked. You can modify messages in this folder before they go out by double-clicking them, making changes and then pressing Send. Likewise, you can cancel a message by deleting it from this folder.
- **Sent Items.** You can save and manage any EDI or e-mail messages that you have sent with the *Sent Items* folder. You can know for sure if you had sent an EDI to a client and even foward them a copy of the sent message. Reports that were sent EDI will be stored here and can be placed back into the File Cabinet if you should ever happen to accidentally lose the report.

Working with messages

There is a function in Windows that allows more than one item to be marked at a time. This same method can be used in WinTOTAL to mark multiple files:

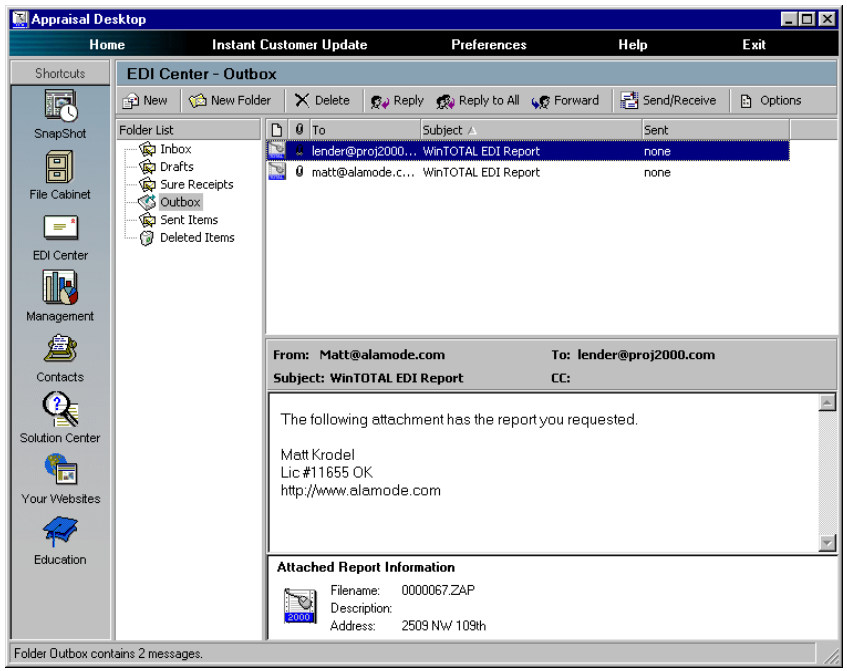
- *If the desired files are grouped together*, click on the first file, hold down the SHIFT key and click on the last file in the group. This will highlight the entire group.
- *If the desired files are "scattered" in the folder*, with reports in between that are not to be marked, hold down the CTRL key while clicking on each individual file to be highlighted. This will allow multiple files to be selected without loosing the highlighting on whatever has already been highlighted.

Once a message or messages are selected, you can use the copy, move and delete commands just as you would in Windows Explorer.

Manually copying attached reports to the File Cabinet

A report that is attached to an e-mail message in our EDI Center can be copied back into the File Cabinet from a message by doing the following:

1. Open the message



The Outbox system folder in the EDI Center shows messages queued to be sent the next time WinTOTAL does its sending and receiving. To clear a message from here, just click it once and click delete.

2. Double click the report attachment.
3. If the report already exists on in your system, you will be presented with the supposed match and given an opportunity to either update the existing file or create a new one.

- To save the current report as an additional report in the File Cabinet, click **New** and then choose the specific folder to where you want to save the report. Click **Save** and this will create a copy of the report in that specific folder in the File Cabinet.
- To replace the current report in the File Cabinet, click **Update**. This will replace the report in the original folder with this attached report.

For files that are not native to WinTOTAL, you will simply be presented with a Save As dialog where you can browse to directory and save.

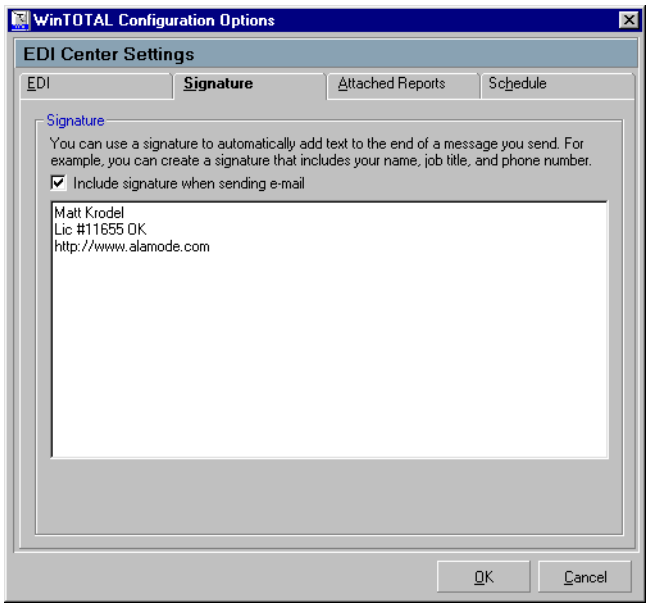
Create an e-mail signature

An e-mail signature is basically a default salutation that can be added to any message that you send from WinTOTAL. This isn't your digital signature. (Digital signatures are describe in ***"Digital Signatures"*** on page 2.9.

1. In the EDI Center, click **Options,** and then click the **Signature** tab.
2. You can type in new information in the window or copy and paste information that is stored on the Windows clipboard. You can paste information that was copied to the clipboard, simply by right clicking in the window and left clicking **Paste**.

- You can copy almost any type of data to the Windows clipboard, by highlighting text in any program, right clicking on the selection and clicking **Copy**.

3. To include the signature in the message, place a check in "Include signature when sending e-mail" and click **OK**. Now, every message you send from the EDI Center will have this e-mail signature at the end of the document.


WinTOTAL Configuration Options
EDI Center Settings
EDI
Signature
Attached Reports
Schedule
Signature
You can use a signature to automatically add text to the end of a message you send. For example, you can create a signature that includes your name, job title, and phone number.
Include signature when sending e-mail
Matt Krodel
Lic #11655 OK
http://www.alamode.com
OK
Cancel

Instead of typing your name every time at the bottom of an e-mail message, set up an e-mail signature.

Troubleshooting and Questions

To see if you have Dial-Up Networking (DUN) installed:

If your system does not use a Dial-Up Networking connection to connect to the Internet, our Internet Wizard will indicate that it is unable to locate a connection.

Dial-Up Networking is the Windows standard for connecting to the Internet. If you're already on the Internet, it's very likely that you have a standard connection.

1. From your Windows desktop, double-click the **My Computer** icon.
2. In the *My Computer* window, if you do not see a **Dial-Up Networking** folder, please contact your Internet Service Provider for more information on installing Dial-Up Networking and creating a Dial-Up Networking connection. If you do see this folder, then Dial-Up Networking is installed. Double-click on this folder.
3. Within this folder you should have an icon that references your Internet Service Provider. For example, if you have an account with the Microsoft Network, you would see an icon called "MSN".
4. To verify the connection works, double-click on the icon. You may need to type in your username and password.
5. Once the system is through dialing, you should be able to browse the web.

Passwords and network components

In order for Windows Dial-Up Networking to remember your password, you must have at least one active Windows login. In addition, you must have a specific set of network components installed. Listed below is the step by step process to have your system remember the password.

This part gets a little technical because you are installing Windows components on your system. a la mode can not take responsibility for any problems that may arise during this process. **If you are not comfortable with installing Windows options, you may consider calling in someone more experienced in this area.**

1. Click the **Start** button, select **Settings**, and then **Control Panel**.
2. Double-click the **Network** icon in the *Control Panel* window.

3. Check the list of "installed network components" for the following:

- Client for Microsoft Networks
- Dial-Up Adapter
- TCP/IP

4. If any of these are missing, they will need to be installed before your system will remember your password. To add any of the above items, click the button marked **Add** and follow the prompts. All of these components can be found by selecting **Microsoft** from the list of *Manufacturers*.

Note: TCP/IP is known as a "protocol." If you have other adapters installed, such as a network card, check the list of installed network components to see that TCP/IP is installed for the Dial-Up Adapter.

5. Click **OK** to close the *Network Properties* dialog.
6. If you made any changes here, you'll have to restart Windows.

Upon restarting, Windows will prompt you for a Windows login. At this point, you can create a true password for Windows In which case, Windows will prompt you for that password each time you boot your computer. If you prefer, you can leave the password boxes blank, and Windows won't prompt for a password. Either way, a Windows login will be created and you will now be able to save your Dial-Up connection's password.

Using America Online for EDI

WinTOTAL uses the standard Dial-Up Networking features found in Windows. This is the type of Internet connection provided by companies that specialize in Internet connectivity such as Sprynet, and MSN, as well as most local Internet Service Providers. Dial-Up Networking is the standard in the industry used by more people to connect to the Internet than any other method.

America Online historically has used a proprietary, non-standard, direct modem connection instead of Dial-Up Networking. It is possible to use America Online with WinTOTAL's Internet tools. (You must use the America Online 3.0 or better client.) ***We can't guarantee results and our technicians don't support this non-standard connection method.*** Now that we've warned you, here's how to try it anyway:

- Instead of allowing WinTOTAL to connect automatically, you must log on with the America Online client before doing anything related to the Internet - configuring, getting updates, EDI, etc. (This makes automated sending and receiving of reports and orders impossible.) After connecting to America Online manually, just minimize the application to the task bar.
- When configuring, choose the Local Area Network (LAN) option instead of the option for modem and phone line. This will cause WinTOTAL to look for the existing Internet connection instead of attempting to establish a new one. *Remember, you'll need to log on to America Online separately even before configuring WinTOTAL.*

Finding an Internet Service Provider

Using an ISP that implements standard Windows Dial-Up Networking is the way to go. First see if someone in your field has a provider they recommend. If it works for them, it will probably work for you. If you don't know of anybody to refer you, try a local computer store for names of providers with which they have experience. Remember: good, reliable, service is more important than saving a few bucks a month in fees.

You may want to go with a national provider. One advantage to a national provider is that you will be able to connect to the Internet, toll-free, no matter where you are in the United States. But a local provider may be able to provide a different level of service because of locality.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

IDC - Internet Data Connector

Internet Data Connector

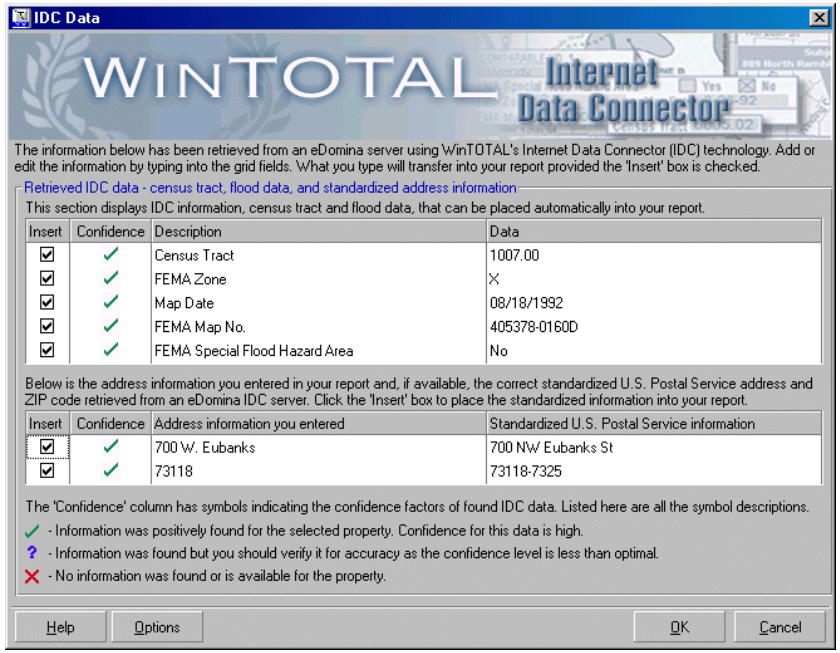
With the new release of version 4.0 of WinTOTAL the ability to introduce the latest in time saving technology for appraisers in the wasy of our Internet Data Connector or more commonly refered to as: “IDC”. Don’t underestimate the impact that the IDC and Geocoding will have on your work in the coming years. One of the biggest benefits is that the IDC feature in WinTOTAL acts as a really fast typist that can visit websites and pull all of the relevant information without ever having to visit a single web page. All of the actions of the IDC are done “behind the scenes” in WinTOTAL without ever changing the screen that you are working on.

Flood & Census Data

Extra feature in WinTOTAL Enterprise

For our customers that are using the Enterprise version of WinTOTAL, we have now introduced the ability to get flood and census data with a few clicks of the mouse.

1. When in a form (with the subject address entered) click the button at the top of the tool bar that reads IDC Data.
2. From there, you will see the prompt screen that describes our GeoCoding and how it works. Once you have read all of the GeoCoding information, click **OK** and this will connect to the eDomina internet data servers.
3. Using your existing Internet connection, WinTOTAL will navigate to the eDomina internet data provider, submit the subject address and pull back the particular findings for that address. While this is happening, you will see the IDC “Gathering IDC data” screen showing the status of your request.
4. Once the information is obtained, you will see the screen that is shown here on the right.
5. To import the information, first make sure that the checkboxes in the “Insert” column on the left side of the screen have been checked. Then click **OK** and the flood & census data will automatically be imported to the proper sections of your report.


IDC Data
WINTOTAL
Internet
Data Connector
The information below has been retrieved from an eDomina server using WinTOTAL's Internet Data Connector (IDC) technology. Add or edit the information by typing into the grid fields. What you type will transfer into your report provided the 'Insert' box is checked.
Retrieved IDC data - census tract, flood data, and standardized address information
This section displays IDC information, census tract and flood data, that can be placed automatically into your report.
Insert
Confidence
Description
Data
Census Tract
1007.00
FEMA Zone
X
Map Date
08/18/1992
FEMA Map No.
405378-0160D
FEMA Special Flood Hazard Area
No
Below is the address information you entered in your report and, if available, the correct standardized U.S. Postal Service address and ZIP code retrieved from an eDomina IDC server. Click the 'Insert' box to place the standardized information into your report.
Address information you entered
Standardized U.S. Postal Service information
700 W. Eubanks
700 NW Eubanks St
73118
73118-7325
The 'Confidence' column has symbols indicating the confidence factors of found IDC data. Listed here are all the symbol descriptions.
- Information was positively found for the selected property. Confidence for this data is high.
- Information was found but you should verify it for accuracy as the confidence level is less than optimal.
- No information was found or is available for the property.
Help
Options
OK
Cancel

Use the WinTOTAL 2000 IDC Wizard to quickly import flood & census data from the eDomina Internet Data provider.

IDC - Internet Data Connector

Custom settings within the IDC

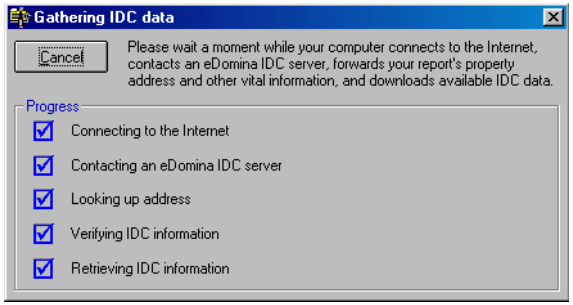
WinTOTAL's IDC feature allows you to customize your flood and census information to your specifications:

To begin the customize process, do the following steps:

1. From within IDC data screen shown on the right, click **Options**.
2. In the dialog that appears, you will have the following set of options:

- Data Options - This section contains the ability to append the MSA# to appear at the beginning of your Census Tract finding and gives you the ability to make all of the alphabetical characters appear in uppercase.
- Data Transfer Options - This section gives you the option of having all of your "Insert" checkboxes not marked, check only the "Instert" boxes that have information and check all of the "Insert" boxes so that the entries that have no data will transfer a blank into the report
- Insert Legal Addenda - WinTOTAL gives you the ability to add a legal addenda regarding the IDC data to protect you from liability.

Remember: Changing any of the options in this section will not be applied until the next time that you run the IDC feature.


Gathering IDC data
Cancel
Please wait a moment while your computer connects to the Internet, contacts an eDomina IDC server, forwards your report's property address and other vital information, and downloads available IDC data.
Progress
Connecting to the Internet
Contacting an eDomina IDC server
Looking up address
Verifying IDC information
Retrieving IDC information

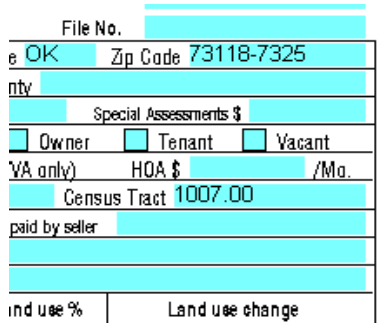
After confirming your addresses, WinTOTAL will use your existing Internet connection to access your flood and census data

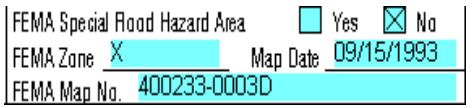
Standardized USPS Address

In order to help obtain the absolute correct address for your IDC information, WinTOTAL now verifies the address that you typed into your report and will compare it to the standardized U.S. Postal Service address and ZIP code when the information is available.

After WinTOTAL has obtained your flood and census information you will see a section below that will show the address that you submitted and the standardized U.S. Postal Service Address whenever it is available.

*Once WinTOTAL has obtained the flood & census information from the eDomina internet data site, click the **OK** button. From there, all of your findings will transfer back into your report automatically!*





Confidence Level Colums

Any information that is obtained in the IDC feature, will provide you with a confidence level indicator. Below you will find a description for the icons that appear with your IDC data:

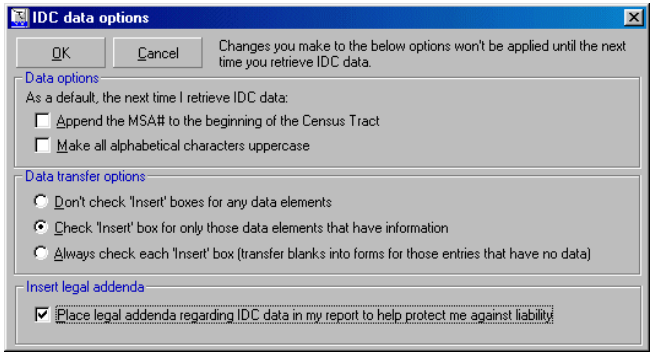
1. **Green Checkmark** - Information was positively found for the selected property. Confidence is high for this level

IDC - Internet Data Connector

2. **Blue Question Mark** - Information was found but you should verify it for accuracy as the confidence level is less than optimal.
3. **Red X** - No information was found or is available for the property.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You can also find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.


IDC data options
OK
Cancel
Changes you make to the below options won't be applied until the next time you retrieve IDC data.
Data options
As a default, the next time I retrieve IDC data:
Append the MSA# to the beginning of the Census Tract
Make all alphabetical characters uppercase
Data transfer options
Don't check 'Insert' boxes for any data elements
Check 'Insert' box for only those data elements that have information
Always check each 'Insert' box (transfer blanks into forms for those entries that have no data)
Insert legal addenda
Place legal addenda regarding IDC data in my report to help protect me against liability

Using the IDC data options, you can specify how WinTOTAL responds to the data gathered online.

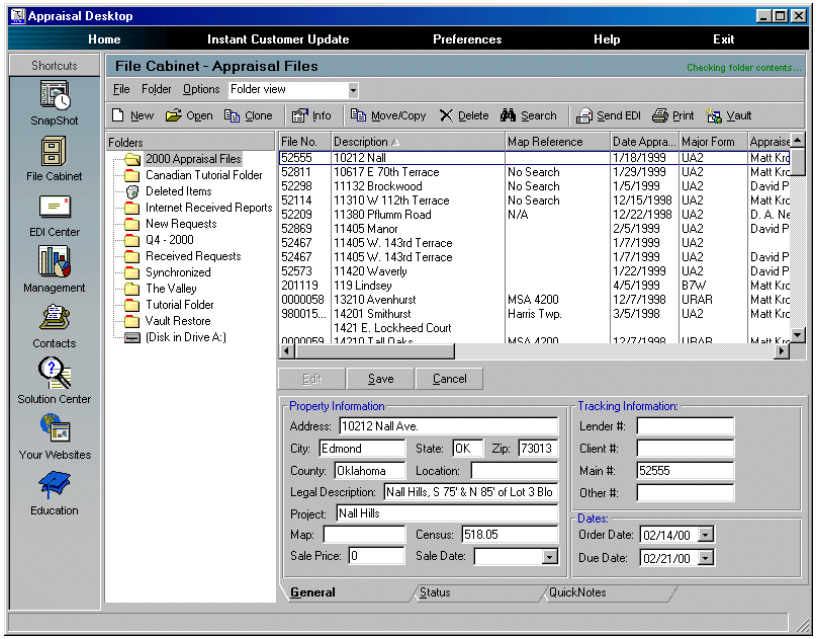
File Management

Managing Your Files

The Appraisal Desktop's File Cabinet is a critical and very powerful module. It lists all report files, and shows them in "folders" you've created. It's the equivalent of the File | Open screen in most programs, but it has several enhancements beyond simple loading of files.

- The File Cabinet keeps you from using Windows Explorer for file management since it has searching, sorting and its own folders.
- The File Cabinet is database driven with bi-directional data transfers between the forms and your database. You don't have to enter things once in the File Cabinet view and then again in your report. And the database makes file operations in the File Cabinet fast!
- The File Cabinet also has convenient functions such as file recovery, EDI, printing, archiving to the eDomina Vault and more.

For a basic tutorial on starting reports and the Requester, be sure to see the ***"Welcome to Athena"*** guide. To learn about complete office management, receivables, tracking multiple appraisers, fee splits and fee tables, see our ***"Payments and Order Tracking"*** guide.



WinTOTAL's File Cabinet is your gateway to your appraisal reports.

Managing Folders and Views

The difference between folders and views

WinTOTAL allows you an unlimited number of folders in which to organize your reports.

- Folders represent the physical location of the report on your disk. To view the reports in a particular folder, just click the folder description on the left, and the reports will be displayed on the right.
- Different "views" go beyond the physical organization of your files/ A drop down menu near the top of the File Cabinet with a default setting of Folder View enables you to see reports based on their level of completion or in one list regardless of where they are saved.

Note that the purpose of folders is to help you organize your reports into more manageable groups (such as by client, or by appraiser, or by month, etc.). *Keeping all reports in one folder is the equivalent of just throwing paper files into a drawer without regard for organization! Your hard drive*

and network also become inefficient and slow when 500 or more files are in a single directory.

Create a new folder

1. Click the menu item labeled **Folder** and select **New**.
2. Type a description new folder and click OK.
3. You'll then see your newly created folder in the File Cabinet. It becomes the active folder, and of course, it's empty right now.

Attaching a directory

WinTOTAL has the ability to look at a plain directory on your system as if it was a folder. Use this to copy files from a laptop to a network or to restore files from a ZIP, JAZ or recordable CD.

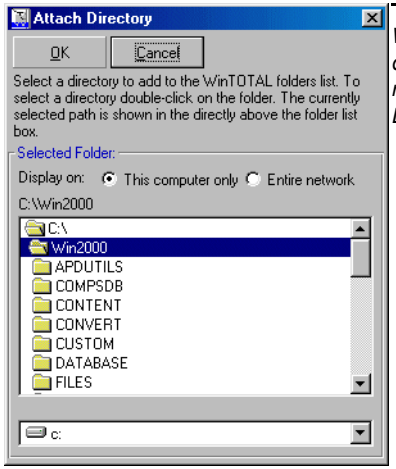
1. Click Options, and select Attach external directory.
2. Use the standard Windows directory tree to navigate to the directory where your files are stored
3. If you are on a LAN, specify whether or not you want other users to see this directory in their File Cabinet too.
4. Once you've found the directory, just click OK.
5. You'll be prompted for a "real" name for your attached directory. You can enter anything you want here.
6. Once you have connected to an external directory, you can copy files from it to work on them in a "real" WinTOTAL folder. You may need to click a different folder and then click back on your attached directory before the reports become visible.

To disconnect from the external drive, go to the **Folder** menu and select delete. You will be prompted to confirm your action.

It is intentional that you cannot open the reports from an external drive or perform editing functions on them. Basically, what you should do is copy them into your WinTOTAL structure and then work on them.

Customizing the columns in the report list

The columns that you see in the File Cabinet (Description, Map Reference, etc.) are completely customizable. You can add columns from a list of over 30 different parts of a report, including Fee, Appraiser, Map Reference, Client, and more.



WinTOTAL organizes your files underneath one directory. However, to access reports outside the reular File Cabinet folders, you can use our Attach Directory function.

File Management

You can add different columns for each of the File Cabinet's views. For instance, when using the Accounting view, you may want to see different information about a report than what you would want when looking at the Requests view. Take a moment to click the various views and note the different columns in view. Then, lets customize the columns in the main folders view.

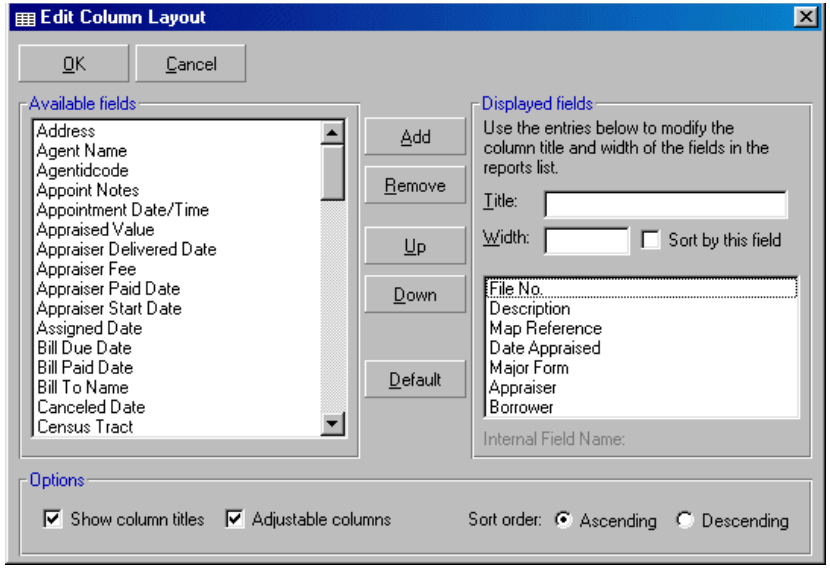
1. Click Options, and choose Edit column layout.
2. This is a list of all the possible columns for the current File Cabinet view. To add one of these to your on-screen list, just click once on it and then click Add.
3. To remove a column, just highlight it on the list and click Remove.
4. Use the Up and Down buttons to re-arrange the order of the columns on screen.
5. To sort by an item in the list, click once on its description on the right. Click the Sort by this field checkbox, and then decide on Ascending or Descending at the bottom of the dialog.
6. You can specify a column width in the Display Width field. Just click once on the item and enter a number. Since there isn't necessarily any way to know how wide you'll need the column, you'll probably want to size the column interactively. This is described in the next section.

When you are finished customizing the column layout for this File Cabinet view, click OK to accept your changes and return to the File Cabinet. You will see your changes immediately. To change the column layout for the other views in the File Cabinet, you must first click that view to select it. You can then customize its columns following the same steps as above.

Interactively changing column widths

As described above, you can manually enter a column width for the existing columns displayed in the "Edit column setup" screen or you can size the columns interactively.

1. If you are still in the column layout screen, click OK to return to the main File Cabinet screen.
2. Move your mouse slowly past the columns in the reports list.



The File Cabinet uses a database to manage your report files. You can customize which fields are displayed on a view by view basis.

3. You'll now notice that when you move your cursor toward the edge of a column, it changes to something that looks like a double arrow.
4. When your cursor looks like a double arrow, hold down your left mouse button and drag the column to the desired width.
5. When the column is the desired width, release the mouse button.

Sorting the report list

The File Cabinet allows you to sort by any column visible on screen, in ascending or descending order. Click the column heading, and the list will be sorted by that item. The first time you click, they will be sorted ascending - denoted by an arrow pointing up. Click the column heading again to sort the list descending.

Working with Reports

Editing report information from the File Cabinet

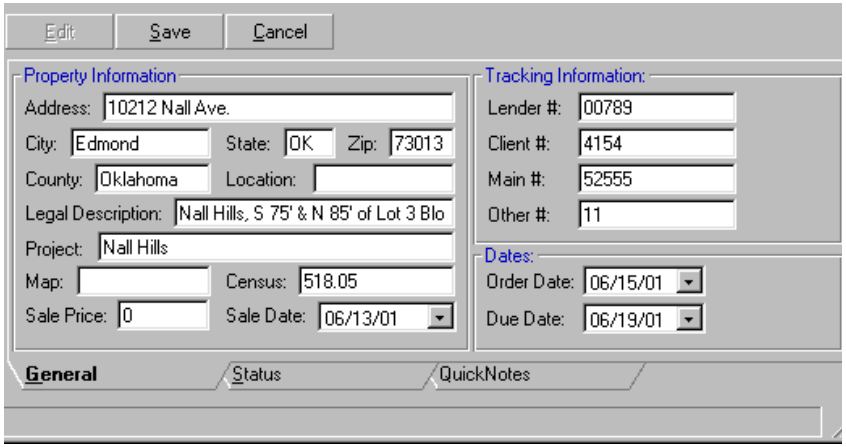
The File Cabinet gives you quick access to basic report info. As click from report to report, you'll see information change in the lower panel. To edit this information right from within the File Cabinet without having to open the file, just click Edit.

- Property information will transfer into your report next time it is opened.
- Likewise, you can easily get to the status information, too. This is a lot faster than opening the whole report.
- Our new QuickNotes feature supplies you with a fast way to jot down notes about the assignment without opening the report or using paper post-it notes. These notes are transferred into the Digital Workfile. See our chapter on ***"USPAP Compliance in the Digital Domain"*** for details on how to eliminate the need to store paper copies of reports.

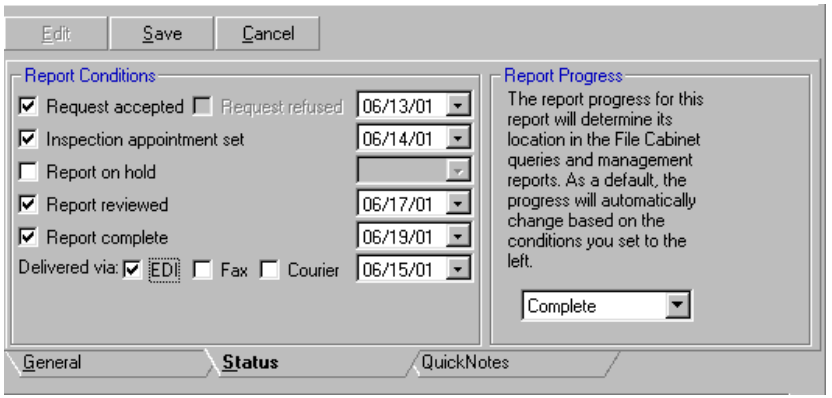
Selecting one or several reports

This section will cover operations such as moving, copying and deleting reports. WinTOTAL allows you to perform these operations either one report at a time or on multiple reports.

Of course, to select a single file, you just click once on it and it's highlighted. Here's how you can select blocks of reports. This works just as Windows Explorer. Here's how you select multiple files at once.



Basic report elements may be editted straight from the File Cabinet without even opening the report.



Status is key to our accounting functions as well as the ability to keep clients proactively informed with automated e-mail messages based on status items you mark.

1. Go to a folder that has multiple reports - preferably 8 or more.
2. Click the first report in the list so that it is selected.
3. Now, hold down the SHIFT key and click a report further down in the list. Look, the whole block has been selected.
4. Hold down the CTRL key and click a report even further down in the list and notice that it becomes selected too.
5. Hold down the CTRL key and click a report that is already highlighted and you'll notice it becomes deselected.
6. Go to a report farther down in the list and do a CTRL+click and see that it is highlighted.
7. The final trick is to go down farther and do a SHIFT+CTRL+click. Now you have two blocks of files highlight.

To summarize: SHIFT+click selects a block of reports. CTRL+click adds to the current selection. By using the sort functions in File Cabinet, you can creatively select groups of files by date, client, etc.

Moving reports to another folder or disk

WinTOTAL's File Cabinet makes file manipulation really easy.

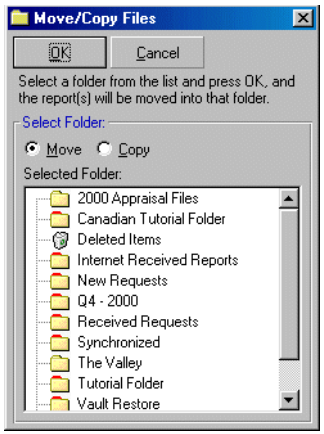
1. Select the file or files you want to move or copy.
2. Click the **Move/Copy** button.
3. Click the **Move** option if you want to move the reports. Click the **Copy** option if you want to copy them.
4. Click the folder name where you want the report to go. You can also use this same procedure to copy files to a floppy disk or removable drive.
5. Click OK.

You can also drag and drop files between folders as in Explorer.

- Dragging to another folder will move the file.
- Dragging to a disk will copy the file.

Deleting reports

Just as you can copy files, you can also click Delete to remove them. Instead of being erased permanently, they are saved in your Deleted items system folder. This is similar to the Windows Recycle Bin. Once



File Move and Copy functions work with buttons as well as by dragging and dropping.

you delete a file from there, it is permanently erased. To completely clear your deleted items, do the following:

1. Click the Deleted Items system folder.
2. Click the first report.
3. Scroll to the end of the list and SHIFT+Click the last report. You'll see them all highlighted.
4. Now, press the Delete key on your keyboard.
5. You'll be prompted to delete the first file in the list. You can choose Yes to all and everything will be permanently erased from your Deleted items.

Be careful when deleting files. Disk space is cheap, but your time isn't!

Recovering lost reports

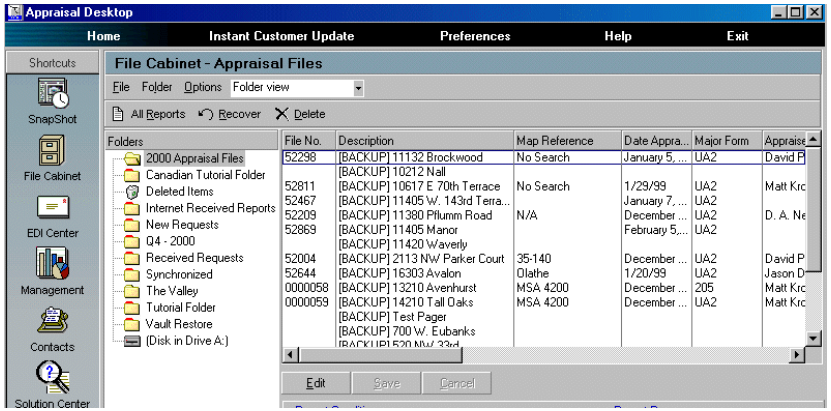
WinTOTAL reports are actually made up of many small files compressed into one large one. When a report is open, each of the components of your appraisal are stored in a temporary directory on your disk. When WinTOTAL automatically saves between forms, it is only saving the tiny portion that changed - not the entire report. The entire report is saved when you physically click the Save button, or when the file is closed.

If we saved the ENTIRE file every time you jumped between forms, the program would seem slow because an appraisal report could be 300K-500K in size depending on the number of pictures. That's a significant amount of data to process and save to disk! The "quick save" is faster.

In the case of the unfortunate incident that your system shuts down in the middle of a report, the temporary files that make up your appraisal could still be left on your system; and the re-opening the report could cause it to appear as though you lost changes. This is because WinTOTAL didn't have an opportunity to merge the changed portions back in to the combined file.

In the event that you experience a system crash, here's one way to make sure you haven't lost any data:

1. Click the folder in which the appraisal was located.
2. Click the Options menu and choose View Recoverable Files.
3. You'll then have two different types of files:



A key objective of WinTOTAL is to keep you from repetitive data entry - even when your system crashes. Our Recover feature will help you get back going with your latest changes.

File Management

- **[OPEN]** means you have "pieces" of the appraisal open. This will have your most recent changes.
- **[BACKUP]** files are useful if the appraisal doesn't appear at all. The backup file is a copy made the last time you saved.

4. You can restore either the backup, or piece together the **[OPEN]** file by moving your cursor over the file description and clicking with your right mouse button.
5. You will then see a menu fly-out. Select **Recover**.

The recovered file will have "recovered" in the description, To go back to seeing your reports in the normal view, click "All Reports".

Rebuilding the reports list

Rebuilding the reports list is handy in cases it appears as though files are missing from a folder. (It could be due to a database error or other unknown problem.) To use the "rebuild reports" function, simply click once on the folder's description, then select Rebuild the reports list from the Folder menu.

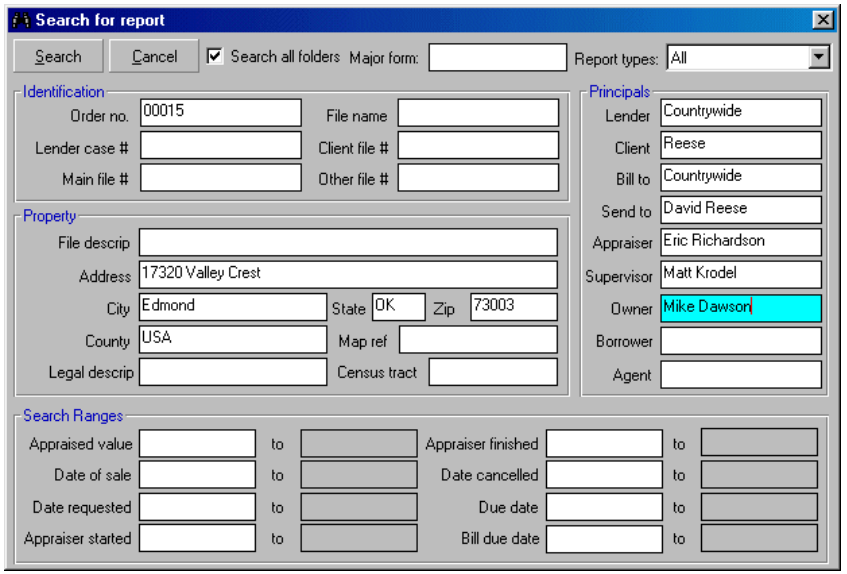
Searching for reports

If you need to find a report, but you don't know what folder it is in, you may use the search function to find it by nearly two dozen attributes.

1. Click the Search button.
2. As with any WinTOTAL module, just enter part of the text on wish you want to search. You don't need to enter the complete word. For example, entering YORK in the City field would find reports done in NEW YORK CITY and YORKSHIRE.
3. Check on the option for Search all folders if you want to search your entire database.
4. Click OK after you have entered your search criteria.
5. If matches are found, they will be displayed in a dialog a lot like the all files dialog. You can apply sorting criteria and other viewing enhancements if you wish.
6. Click the All Reports button to bring all of your files back into view.

Renaming a report - changing its description

Sometimes you'll need to modify a report's description.



Seach your file database on one item, or a combination of data you've entered on the forms.

1. First, make sure the report is not currently open.
2. Go to the File Cabinet and click the report once to select it.
3. Click the File menu and choose Rename.
4. You'll then see a dialog in which to type the new name. You can enter over 200 characters including spaces and punctuation.
5. Then, click OK.

Printing from the File Cabinet

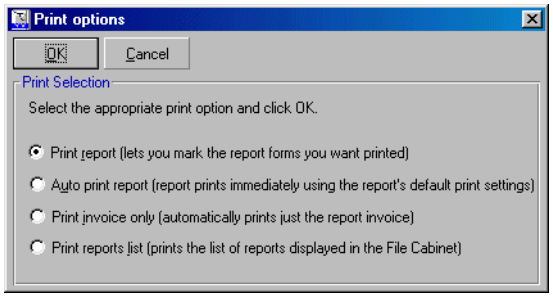
The File Cabinet offers handy printing features that keep you from opening reports just to get a hard copy as well as get a list of what's on your system. Click the Print button, and we'll describe the options.

Print report. This will initiate's WinTOTAL printing functions for the currently selected report. Options will be displayed before printing,

Quick print report. Instead of giving printing options, the current report will be printed using whatever your defaults are.

Print Invoice only. This will send the Invoice only to the printer.

Print reports list. The columns you choose to view on screen for a particular view are the same ones that will print for that view if you have the File Cabinet print a list of reports. You may wish to set the page orientation for Landscape.


Print options
OK
Cancel
Print Selection
Select the appropriate print option and click OK.
Print report (lets you mark the report forms you want printed)
Auto print report (report prints immediately using the report's default print settings)
Print invoice only (automatically prints just the report invoice)
Print reports list (prints the list of reports displayed in the File Cabinet)

Reports and other information can be printed right from inside the File Cabinet.

Status and Other Views

File Cabinet views

Up to now, we have only covered the main Folders view in the File Cabinet. As mentioned previously, there are several other "views" of your reports and tools available to assist in office management. Click the drop-down list showing "Folders" by default and you will see the other views available: Requests, In Progress, Completed, Accounting and All Reports.

They filter out reports based on status. And different sub-filters are available for the different views - such as in the accounting view, you can see reports that are 30, 60, 90 days past due. Being aware of the different types of status will help you make better use of the File Cabinet and its views.

Assigning status to a report

WinTOTAL and the File Cabinet rely on the data reported in the status screen of the Requester. The Status Viewer can be accessed several different ways:

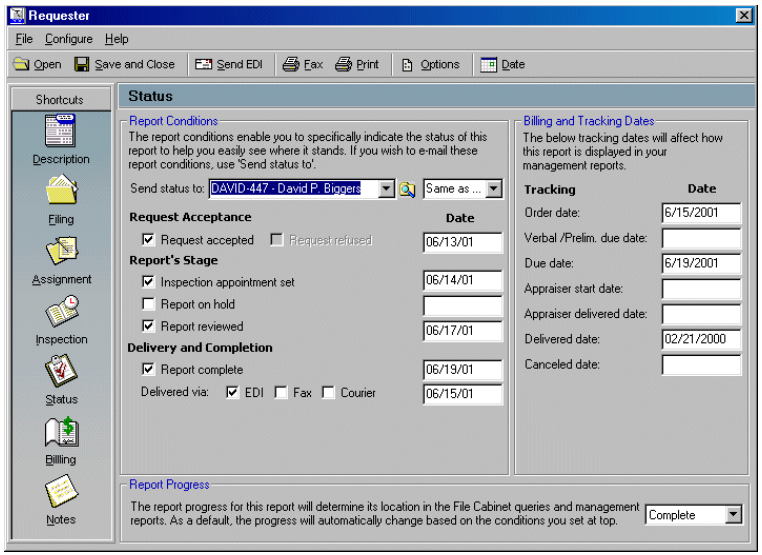
- WinTOTAL can prompt you automatically for a report's status whenever you close a report after working in it. You can turn this on and off by clicking the Preferences while in the File Cabinet and marking / clearing the checkbox on the Miscellaneous screen.
- Within a report, you can manually access the Status Viewer by clicking the File menu and selecting “Report status”.
- Similarly, in the File Cabinet, you can also quickly view or edit a report’s status by clicking the status tab at the bottom of the File Cabinet and clicking the Edit button. This is just a summary of the status information.

How status is used

As you check off the various status markers, the file becomes visible in different File Cabinet views. **The status flags keep you from having to use File Cabinet folders to manage your report progress.**

- Until you mark something as accepted, it is considered a Request.
- You can also use the Report Progress drop down to explicitly state where you are in a report in addition to marking off status markers.
- WinTOTAL’s accounting features require reports to be marked as completed before they will show up on statements.
- The dates you can enter with the status messages help you figure turnaround times for you and your appraisers.
- On the status screen in the Requester is a field for “Send status to”. If you have an entry here, that person will receive status messages via e-mail (configured in your Address Book entry) for the current report.

The benefits of being able to see where a report stands without having to open it are immense. *What if you had an assistant that was always available to answer the phone at the office while you were in the field?* If a lender called wanting to know where you were on a report, the assistant would normally have to track you down, get the information, and call the client back. Using the status flags in WinTOTAL, your assistant could



Use the status screen in the requester to keep track of report progress as well as enter dates that aren’t part of the appraisal form data.

view the status right from the File Cabinet without even opening the report!

The "All Reports" view

The All Reports view is actually not based on status. It shows all reports on your system in one handy list, regardless of their folder or status. This view is great for file manipulations since you can see reports from multiple (actually all) folders in one list.

- Use the sorting techniques described on page 4 to sort the items in this view.
- Just like all the other views, this one can have its own set of columns too as described on page 2.

Remember, file operations performed in this and all views DO affect the reports in your folders. If you delete files in the Accounting or All Reports view, they will disappear from your folders.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

Payments and Order Tracking

The billing and tracking module built into WinTOTAL offers power and flexibility for small and large appraisal offices alike. This chapter will cover the basics of billing clients, paying the appraisers in your office and generating comprehensive management reports. These functions tie together several portions of the WinTOTAL system.

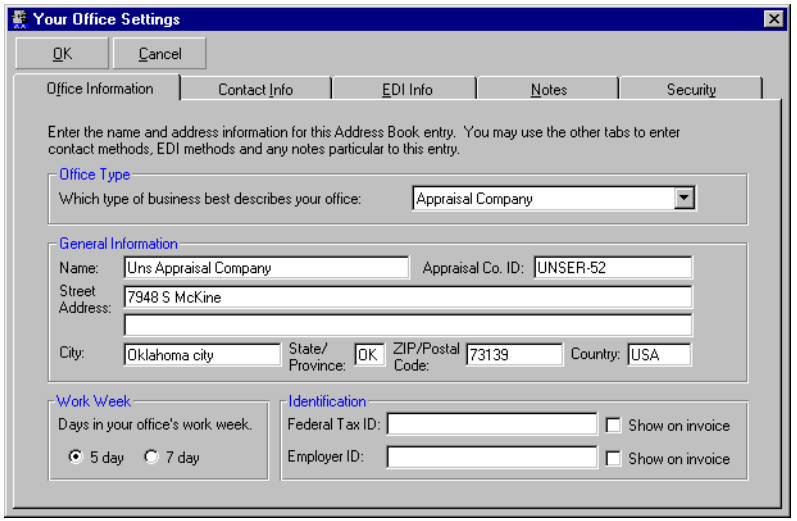
- The Address Book stores the different companies and people in the system.
- Report status in the Requester tells us when a job is “complete” and billable.
- The Billing PowerView is where you print invoices.
- The Appraisal Desktop is the starting point for Management Reports.

Configuring Office Settings

About your office

During installation, you were probably prompted for information pertaining to your office. This information is used in our billing module and transferred to your invoices.

1. Open up the Appraisal Desktop, click on the **Contacts** shortcut. Here you can select the categorgy of contact from the pull-down menu. You can add, edit, or delete contact lsitings.
2. Click on the **Edit Local Office...** button and enter the appropriate information for your office here. Note that the Contact Name you enter will appear on Invoices generated by WinTOTAL.
3. Click in the EDI Info tab and enter the Internet E-Mail address used for sending and receiving appraisal reports. This is usually your customer number followed by @proj2000.com. (ex: 4055551234@proj2000.com) Consult our chapter on ***“Sending and Receiving Reports”*** for details on setting up an account with us.
4. Use the Notes tab to enter anything you like. It’s simply free-form text for your internal uses.
5. If you want to assign a security password for billing click on the Security tab and proceed to the next section for instructions. Click on OK when you are through.



Accurate office management begins with entering your Office Settings.

Payments and Order Tracking

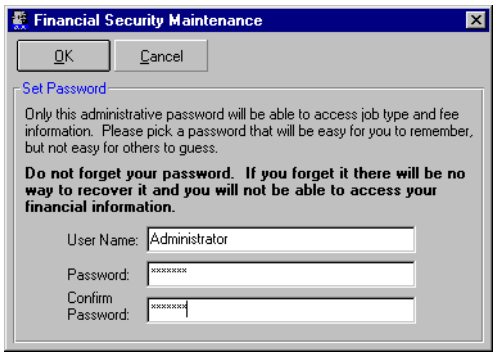
Security Password

You can restrict access to your financials with a password. Be sure to write this password down and keep it in a safe place. If you forget the password, you'll have to start with a fresh set of fee split settings.

1. From the Your Office Settings dialog, click the **Set Password** button.
2. Enter your password. Your typing will show up as asterisks.
3. Click in the next field and enter the password again for verification.
4. Click OK.

Anytime billing information is to be brought up on screen, this password will have to be entered. Once you enter the password in the Requester, you can go back and forth between the Billing tab and others, such as status, without having to re-enter the password.

Financial information may be password protected. Be sure to write your password down.


Financial Security Maintenance
OK
Cancel
Set Password
Only this administrative password will be able to access job type and fee information. Please pick a password that will be easy for you to remember, but not easy for others to guess.
Do not forget your password. If you forget it there will be no way to recover it and you will not be able to access your financial information.
User Name:
Administrator
Password:
Confirm Password:

Setting Up Fee Tables

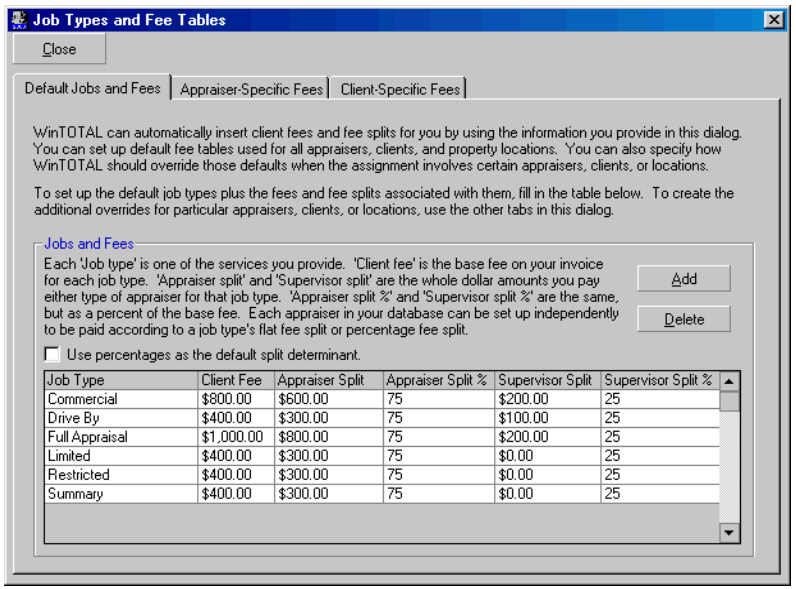
Default Fees

The most simple type of billing is to set up a default fee for the different types of reports you do.

1. Open the Appraisal Desktop.
2. Click on **Management** shortcut and choose **Jobs and Fees**.
3. You'll see a dialog come up with three tabs. Stay on the one labeled Default Fees and Jobs. You'll see a grid at the bottom listing different types of appraisal jobs. There are several listed by default.

- If you use percentages instead of a straight dollar amount, simply check the box labeled "Use percentages as split-fee determinant.".
- To change one of our defaults, simply click in the cell you want to change and type a new entry. As indicated by the instructions on screen, you can use either a percentage or whole dollar amount for the appraiser and supervisor splits.

4. If you need to add another type of job type, perhaps for a rural property, a rush job or a different fee based on the loan amount, click the Add button. Enter the job type and the appropriate amounts. Then click OK. An entry is required in each field, but keep in mind that WinTOTAL uses percentages or straight dollar amounts based


Job Types and Fee Tables
Close
Default Jobs and Fees
Appraiser-Specific Fees
Client-Specific Fees
WinTOTAL can automatically insert client fees and fee splits for you by using the information you provide in this dialog. You can set up default fee tables used for all appraisers, clients, and property locations. You can also specify how WinTOTAL should override those defaults when the assignment involves certain appraisers, clients, or locations.
To set up the default job types plus the fees and fee splits associated with them, fill in the table below. To create the additional overrides for particular appraisers, clients, or locations, use the other tabs in this dialog.
Jobs and Fees
Each 'Job type' is one of the services you provide. 'Client fee' is the base fee on your invoice for each job type. 'Appraiser split' and 'Supervisor split' are the whole dollar amounts you pay either type of appraiser for that job type. 'Appraiser split %' and 'Supervisor split %' are the same, but as a percent of the base fee. Each appraiser in your database can be set up independently to be paid according to a job type's flat fee split or percentage fee split.
Add
Delete
Use percentages as the default split determinant.
Job Type | Client Fee | Appraiser Split | Appraiser Split % | Supervisor Split | Supervisor Split %
Commercial | $800.00 | $600.00 | 75 | $200.00 | 25
Drive By | $400.00 | $300.00 | 75 | $100.00 | 25
Full Appraisal | $1,000.00 | $800.00 | 75 | $200.00 | 25
Limited | $400.00 | $300.00 | 75 | $0.00 | 25
Restricted | $400.00 | $300.00 | 75 | $0.00 | 25
Summary | $400.00 | $300.00 | 75 | $0.00 | 25

Default fees are used for job types when there aren't specific tables for the client and appraiser.

on the **Use percentages as the default split fee determinant** checkbox.

5. Click **Close** when you are through entering your default fees.

Appraiser-specific fee tables

In you involve multiple appraisers and clients in your business, you probably don't have a "one size fits all" solution to billing. WinTOTAL accommodates that by allowing you to have specific billing schemes for different appraisers and clients.

- You may pay appraisers differently based on seniority. Or, maybe one appraiser always does a particular type of job or handles regions for you, so it's just easier to adjust their fees globally. It's completely up to you.
- When an appraiser has a specific fee table assigned to them, the payment or split percentage from their table will override your default settings. Be aware of appraiser-specific fee tables when examining payment for a particular order.
- When choosing an appraiser for a particular type of job, you also have the option to restrict your choices to those that have the current job type in their specific list.

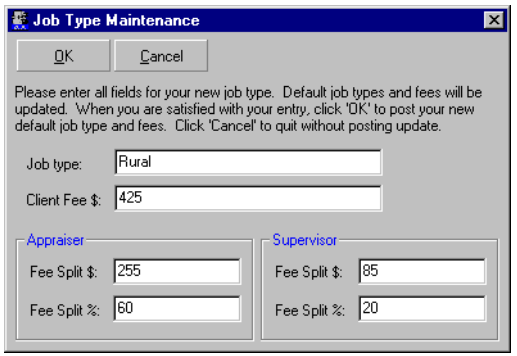
Appraisers with no specific fee table assigned to them just use the default fees discussed in the previous section.

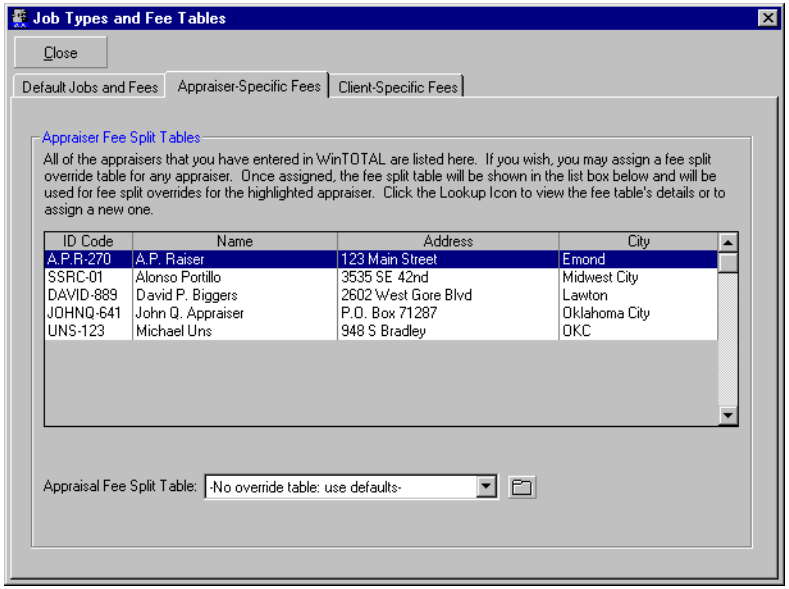
To set up a custom fee table for an appraiser, do the following:

1. On the Appraisal Desktop, click on the **Management** shortcut and then choose **Jobs and Fees**.
2. Click on the **Appraiser Specific Fees** tab.
3. Here, you'll see a list of the appraisers in your system. Click on a name and you will see their fee split table reported below. If no appraiser-specific table is being used for the current selection, you'll see "-No override table: use defaults-".
4. You can either associate another table with this appraiser by choosing it from the drop-down list or create a new table altogether by clicking on the folder icon next to the list.

To create a new fee split table for an appraiser, do the following:

You're able to set up different job types to match the work that you do. These job types show up in the Requester when you start new appraisals.


Job Type Maintenance
OK
Cancel
Please enter all fields for your new job type. Default job types and fees will be updated. When you are satisfied with your entry, click 'OK' to post your new default job type and fees. Click 'Cancel' to quit without posting update.
Job type:
Rural
Client Fee $:
425
Appraiser
Fee Split $:
255
Fee Split %:
60
Supervisor
Fee Split $:
85
Fee Split %:
20


Job Types and Fee Tables
Close
Default Jobs and Fees
Appraiser-Specific Fees
Client-Specific Fees
Appraiser Fee Split Tables
All of the appraisers that you have entered in WinTOTAL are listed here. If you wish, you may assign a fee split override table for any appraiser. Once assigned, the fee split table will be shown in the list box below and will be used for fee split overrides for the highlighted appraiser. Click the Lookup Icon to view the fee table's details or to assign a new one.
ID Code
Name
Address
City
A.P.R-270
A.P. Raiser
123 Main Street
Emond
SSRC-01
Alonso Portillo
3535 SE 42nd
Midwest City
DAVID-889
David P. Biggers
2602 West Gore Blvd
Lawton
JOHNQ-641
John Q. Appraiser
P.O. Box 71287
Oklahoma City
UNS-123
Michael Uns
948 S Bradley
OKC
Appraisal Fee Split Table:
-No override table: use defaults-

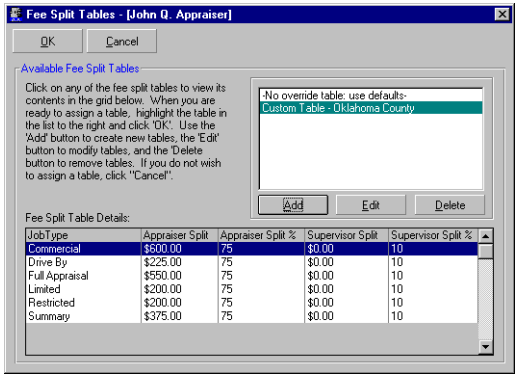
By default, each appraiser in your system is set to use the default fee table.

1. In the Appraiser-Specific Fees tab of the Job Types and Fee Tables dialog, click on the folder icon next to the drop-down list for the Appraiser Fee Split Table.
2. In the top right of the screen, you'll see a list of the appraiser fee-split tables.
3. To add a new one, simply click the **Add** button.
4. On the screen that appears, enter a name for this fee table and then edit the table entries by clicking in each cell.

- You can add new job types just as we did earlier in this chapter by clicking the **Add** button. It is recommended that you add the job to your default list too so that it will show up in your Job types list in the Requester.
- Similarly, you can remove individual job types by clicking the **Delete** button.

If an appraiser has a specific fee table associated with them that does not have all of the Job Types contained in the default list, then they can be excluded from even being assigned a job when the "Restrict to those matching job type" box is checked in the Staff section of the Requester's Assignment tab.

You can have appraiser specific fee tables for situations where you want to pay an appraiser something different than what the default fee table indicates.

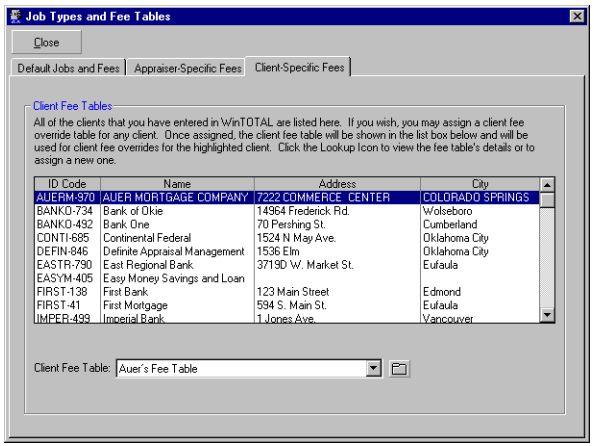

Fee Split Tables - [John Q. Appraiser]
OK
Cancel
Available Fee Split Tables
Click on any of the fee split tables to view its contents in the grid below. When you are ready to assign a table, highlight the table in the list to the right and click 'OK'. Use the 'Add' button to create new tables, the 'Edit' button to modify tables, and the 'Delete' button to remove tables. If you do not wish to assign a table, click "Cancel".
-No override table: use defaults-
Custom Table - Oklahoma County
Add
Edit
Delete
Fee Split Table Details:
JobType | Appraiser Split | Appraiser Split % | Supervisor Split | Supervisor Split %
Commercial | $600.00 | 75 | $0.00 | 10
Drive By | $225.00 | 75 | $0.00 | 10
Full Appraisal | $550.00 | 75 | $0.00 | 10
Limited | $200.00 | 75 | $0.00 | 10
Restricted | $200.00 | 75 | $0.00 | 10
Summary | $375.00 | 75 | $0.00 | 10

Client-specific fee tables

This section assumes you have set up address book entries for the various people with whom you associate. If you are unfamiliar with the WinTOTAL address book, please refer to our Getting Started guide.

You may charge differently for particular clients because of the type of business they give you or their special needs (or lack thereof). It's completely up to you.

1. On the Appraisal Desktop, click on the **Management** shortcut and then choose **Jobs and Fees**.
2. Click on the **Client Specific Fees** tab.
3. Here, you'll see a list of the clients in your system. Click on a name and you will see their fee table reported below. If no client-specific table is being used for the current selection, you'll see "-No override table: use defaults-".


Job Types and Fee Tables
Close
Default Jobs and Fees
Appraiser-Specific Fees
Client-Specific Fees
Client Fee Tables
All of the clients that you have entered in WinTOTAL are listed here. If you wish, you may assign a client fee override table for any client. Once assigned, the client fee table will be shown in the list box below and will be used for client fee overrides for the highlighted client. Click the Lookup Icon to view the fee table's details or to assign a new one.
ID Code | Name | Address | City
AUERM-970 | AUER MORTGAGE COMPANY | 7222 COMMERCE CENTER | COLORADO SPRINGS
BANKO-734 | Bank of Okie | 14964 Frederick Rd. | Wolseboro
BANKO-492 | Bank One | 70 Pershing St. | Cumberland
CONTI-685 | Continental Federal | 1524 N May Ave. | Oklahoma City
DEFIN-846 | Definite Appraisal Management | 1536 Elm | Oklahoma City
EASTR-790 | East Regional Bank | 3719D W. Market St. | Eufaula
EASYM-405 | Easy Money Savings and Loan
FIRST-138 | First Bank | 123 Main Street | Edmond
FIRST-41 | First Mortgage | 594 S. Main St. | Eufaula
IMPER-499 | Imperial Bank | 1 Jones Ave. | Vancouver
Client Fee Table: Auer's Fee Table

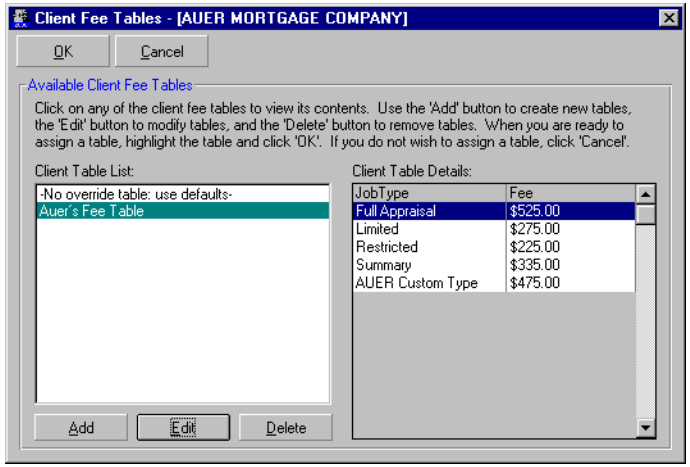
Client fee tables are also customizable. By default, each one uses the default fee table.

4. You can either associate another table with this client by choosing it from the drop-down list or create a new table altogether by clicking on the folder icon next to the list.

To create a new fee table for a client, do the following:

1. In the Client-Specific Fees tab of the Job Types and Fee Tables dialog, click on the folder icon next to the drop-down box for the Client Fee Table.
2. The Client Table list will be on the left with table details on the right.
3. To add a new one, simply click the **Add** button.
4. On the screen that appears, enter a name for this fee table and then edit the table entries by clicking in each cell.

- You can add new job types just as we did earlier by clicking the **Add** button. Any job type you add for a client will also appear in your the Requester's Job types list when that client is entered in the Bill To field.
- Similarly, you can remove individual job types by clicking the **Delete** button. If a Client-specific fee table is associated with a client, only the job types listed for them will appear in the Requester if they are in the Bill To field.


Client Fee Tables - [AUER MORTGAGE COMPANY]
OK
Cancel
Available Client Fee Tables
Click on any of the client fee tables to view its contents. Use the 'Add' button to create new tables, the 'Edit' button to modify tables, and the 'Delete' button to remove tables. When you are ready to assign a table, highlight the table and click 'OK'. If you do not wish to assign a table, click 'Cancel'.
Client Table List:
-No override table: use defaults-
Auer's Fee Table
Client Table Details:
JobType
Fee
Full Appraisal
$525.00
Limited
$275.00
Restricted
$225.00
Summary
$335.00
AUER Custom Type
$475.00
Add
Edit
Delete

You may associate job types with clients as well as charges for those types of jobs. If a client has a custom set of job types, those will be the only ones that show up in the Requester's drop-down list.

Using Fee Tables in Reports

This section assumes you are familiar with cloning reports and the basics of the Requester as described in our Getting Started guide. It also assumes you are familiar with and have added entries into your Address book for the appraisers and clients with whom you do business.

Entering the request

Let's demonstrate how to use fees in the Requester. What we're going to do now is start a new report, demonstrating the items you must fill in to make billing work.

1. On the Appraisal Desktop, click the Tutorial Folder, and click once on the Sample Template.
2. Click the File menu, select **Clone**, and you'll see the Requester appear.

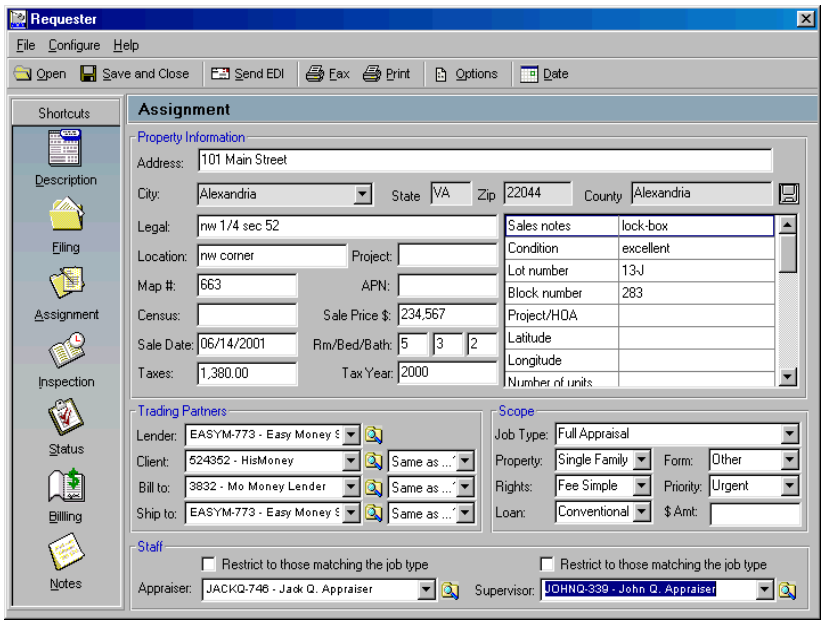
3. Enter a description and any tracking information. Click on the **Filing** shortcut. In the File Template section, click on “Clone the report below, without any data”.
4. Click on the **Assignment** shortcut, and enter theappropriate information in this portion of the Requester. In order to bill someone, you must have an entry in the **Bill To** field.
5. In the Scope section, click on the **Job Type** drop-down and you’ll see the different job types from the previous section of this tutorial. Click the type of job you want and enter any other items in this section.
6. Select the Appraiser and Supervisor (if any). If you check the item “Restrict to those matching job type”, then only appraisers with an entry in their custom fee table for the type of job specified will be listed.
7. Click the **Inspection** shortcut and enter any pertinent information there.
8. Click the **Status** shortcut. *A due date is required for you to track the report. Enter it in the Billing and Tracking section of the Requester.*

- Leave the **Send status to** field blank except in cases where you are entering a request to be delivered electronically.
- If (and only if) you are sending the request electronically and you want status messages from the appraiser delivered back to you as they are checked, put your name in the **Send status to** field. Otherwise, just leave it empty.

9. Click the **Billing** shortcut now. You’ll see your job type and default fee pre-filled in the appropriate fields.
10. In the Fees section, you can enter other miscellaneous items and associated charges as well as a description for the total. These items will also print on the invoice. The diskette icons to the side of the line items will save your entries in a drop-down list for easy reference later.
11. Now, go to the **Notes** shortcut if you need to enter anything else about this request. This is free form information that doesn’t print.

At this point, there are a variety of options available.

- You can click **Open** to open the report and continue working.



When entering information into an order, it is important to specify the Job Type.

- If a Fax driver is installed on your system, you can you may click **Fax** and fax it off to someone. (Note: Microsoft has a free driver that lets you send and receive faxes straight from your computer. Consult your system dealer or Microsoft's web site for details.)
- Similarly, you can click **Print** to generate a hard copy.
- Or, you may simply click Save where you'll see the report appear on the Appraisal Desktop. It will be listed in the Requester below the reports listings, since we haven't marked it as Accepted yet. Once it as marked as Accepted, it will be displayed in the In Progress section.

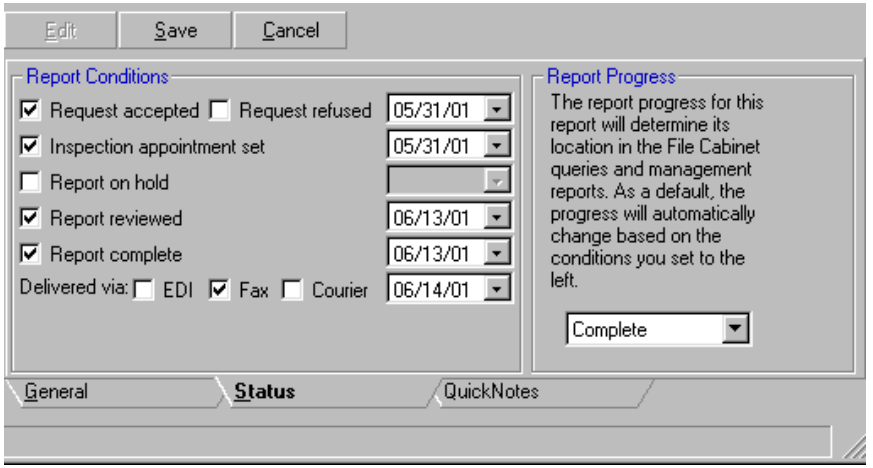
Completing the report with status

Once you have a request on your system using fee tables, you complete it just like any other report. It is important that you note the status items as they help you track the report and signal to WinTOTAL when payment is due.

1. Once a report is ready for billing, click the Info button while the report is open in WinTOTAL. (Note: The report doesn't have to be open for you to edit billing and status information. You may also click **Info** while on the Appraisal Desktop if the report isn't open.)
2. Click on the **Status** tab of the Requester.
3. Mark the report as "Complete". If you are delivering the report that day, go ahead and mark the Delivered item too. *Marking the report "Complete" is what signals WinTOTAL to make it visible in the Accounting view of the File Cabinet.*
4. Click the **Billing** tab in the Requester.

- In the "Client (Bill to)" section, select the appropriate terms from the drop-down list.
- In the "Dates" section, verify the due date and type an invoiced date.
- You may also enter other line items and a description of the grand total for your invoice. Use the disk icons to save your entries so that next time, you can pull them from the drop down lists.

5. Click **Save** to lock in your changes and return to whatever you were doing before - perhaps editing the report. Or, click **Open** to load the report for functions like printing an Invoice.



In order to be "billable" you must mark a job as "Complete". You should also enter in due dates and completed dates to track which appraisers are late or on time.

Payments and Order Tracking

Invoicing and Payments

Generating an invoice

You don't even have to add an invoice form to your report to have one. WinTOTAL will generate one "on the fly". This functionality is useful in situations where the person completing the report doesn't do the actual billing or when the person receiving the report is not the same as the person that is billed.

1. Open the report for which you want to generate an Invoice.
2. Click the Billing PowerView to see the invoice on screen.
3. You can choose a different Invoice format from the drop-down at the top of the screen. The data will automatically fill the on-screen form.
4. Click the Print Invoice button to send it to your printer.

Note: You have the option to add the Invoice form to your table of contents so that it is printed along with the rest of the report. This is a more traditional way of generating an invoice with appraisal software and works for many people. See Chapter 3 on the Contents PowerView for details.

Using the File Cabinet to see outstanding invoices

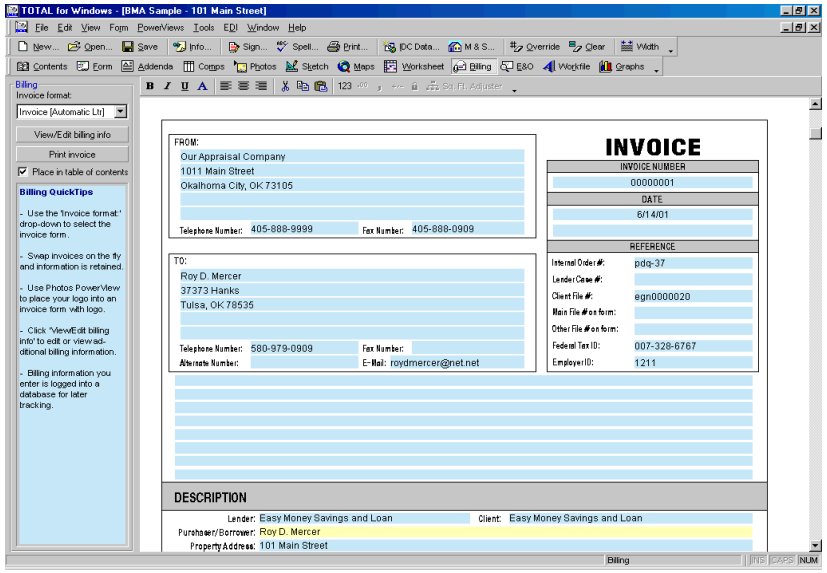
When you use the status features in WinTOTAL, the various views in the File Cabinet come alive. Open the File Cabinet and select Accounting from the pull-down menu.

- You should see a list of all reports, marked as completed, but for which no payment has been received.
- Click on the List these reports drop-down to filter the list by timeliness of the payment.
- The columns in the Accounting view of the File Cabinet may be customized by clicking on **Options** and choosing **Edit column layout**.

Recording payments in the Requester

Once payment is received for an order, simply go to the report information screen by clicking the **Info** button when that report is open or highlighted in the File cabinet.

1. Click on the Billing shortcut.

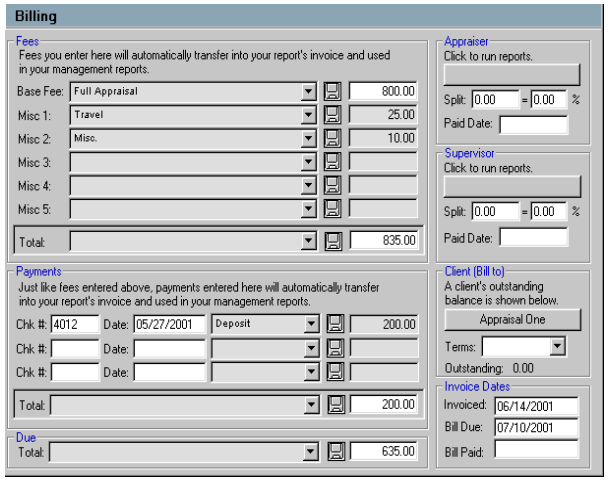


Individual invoices are generated in the Billing PowerView.

2. In the payments section, enter the check number, date, memo field and amount.
3. You can use the field labeled Total to note the payment. If it is a partial payment and another invoice is to be sent, these notes will go with the amount paid.
4. Update the **Bill Paid** field with the date of payment once payment is received in full.
5. At the time you pay the Appraiser and Supervisor, you should update this screen with the date they are paid.

Any information entered here may be shown in the management reports which are discussed in a later section.

Payments received for a job should be entered in the Billing section of the report's Request. sImilarly, this is where you enter payment for the appraiser and supervisor too.

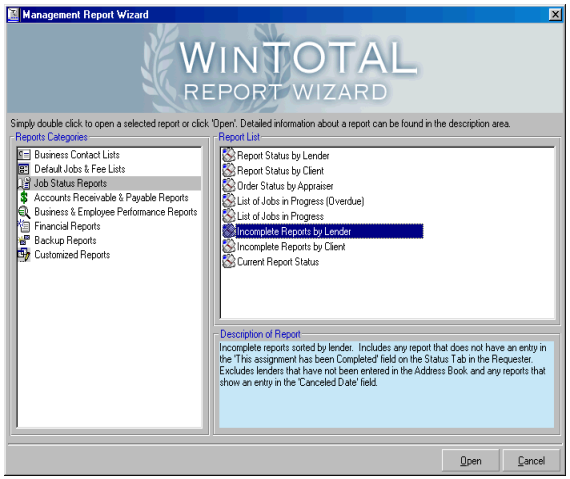


Generating Management Reports

A detailed look at your data

You'll come to a certain point where you'll want to see which appraisers are doing the most work for you, which clients pay on time, which ones are late, etc. WinTOTAL's Appraisal Desktop now offers dozens of reports that let you see where your business stands.

1. Open the Appraisal Dekstop. Then click the Management shortcut and select Management Reports to access the WinTOTAL Report Wizard.
2. You'll then see categories on the left and report names on the right. When you click on a report name, a brief description appears at the bottom of the Window. We recommend browsing through all the reports available - there may be things you never thought of tracking, but recognize as a good idea for your business. *(Note: You can also get to the reports from the Requester's Billing shortcut. Just click on the buttons labeled with the Appraiser, Supervisor and Bill To names.)*
3. To run a report, just double click on its name on the right side of the reports window.
4. The first time you run a report, you'll be greeted by the Report Wizard information screen. Even if you're in a hurry, you should read it. Click on Next when you are ready to continue.


Management Report Wizard
WINTOTAL
REPORT WIZARD
Simply double click to open a selected report or click 'Open'. Detailed information about a report can be found in the description area.
Reports Categories
Business Contact Lists
Default Jobs & Fee Lists
Job Status Reports
Accounts Receivable & Payable Reports
Business & Employee Performance Reports
Financial Reports
Backup Reports
Customized Reports
Report List
Report Status by Lender
Report Status by Client
Order Status by Appraiser
List of Jobs in Progress (Overdue)
List of Jobs in Progress
Incomplete Reports by Lender
Incomplete Reports by Client
Current Report Status
Description of Report
Incomplete reports sorted by lender. Includes any report that does not have an entry in the 'This assignment has been Completed' field on the Status Tab in the Requester. Excludes lenders that have not been entered in the Address Book and any reports that show an entry in the 'Canceled Date' field.
Open
Cancel

Now that you've done such a good job entering your data, you can see it presented in dozens of different management reports.

5. You are then given the opportunity to customize your report, filtering by date or by the appraiser, client or bill-to party. If you want to apply more specific filtering, just click on an item.
6. Once you have chosen other report options, click **Next** and you'll be given an opportunity to output the report to the screen or straight to the printer.

Even if you print to the screen first, you can still make a hard copy by clicking the printer button in the report preview window.

- Use the arrow keys to jump to the pages in your report.
- You the zoom percentage to make the report larger or smaller on screen.
- To close the reporting tool, click on the "X" in the top right hand corner of its window.

Here are things that may be affecting your reports if you don't see the data expected:

- If you applied options such as date filtering, be aware that reports created with older versions of WinTOTAL may not have had some date entries available; hence, they may not show up in reports.
- Older versions of WinTOTAL would allow multiple entries for the same client to exist in the address book. When the older version was updated to Olympus, different client codes were erroneously generated even though the client name was the same. (The new version thinks they were different.) Therefore, some of your reports that list items by client may be splitting up the figures erroneously. The only way to correct this is to manually delete these duplicate entries from your address book. This won't affect your existing appraisals.
- Not all of the items on which you can report are required fields. If an entry in the Request Information for a report is blank, it is likely, the data for that appraisal won't show up in a management report.

To correct these problems, we created the Migration Wizard to help you structure your reports all in one batch. From the File Cabinet, click the Options menu and choose Migration Wizard.

Management Report Wizard
WINTOTAL
REPORT WIZARD
Dates
Below you may select from a list of dates that you wish to include in your report. Enter the beginning search date in the first box. Then enter the ending date for your search in the second box.
Available date fields:
Appraised date
From:
04 / 01 / 2001
Select
To:
07 / 01 / 2001
Select
Select the type of work week which will be used for this report?
5 day
7 day
Contacts
Below you may enter the contact(s) that you wish to include in your report. To select a contact click in the box on the left. A list of all available choices for that type will appear in the box on the right. You may select all contacts for a particular type by selecting 'All entries' from the list on the right.
Appraiser:
- All entries -
Client:
Bill to:
- All entries -
Aaron Lindauer
Alonso Portillo
Brian Smith
Chad Melton
Dave Biggers Jr.
Eric Richardson
Eric Richardson
Jason Dowdy
< Back
Next >
Finish
Cancel

The Report Wizard enables you to filter on additional items so you can narrow things down to a particular date range or contact in your address book.

Export data from the report viewer

The Report Information Wizard built into the File Cabinet also allows you to export its information to a variety of formats including:

- MS Excel
- Lotus 1-2-3
- MS Access
- CSV
- MS Word
- Delimited Text
- Fox Pro
- HTML

The resulting files can be saved to your hard drive or e-mailed using a MAPI compatible e-mail program like MS Outlook or Outlook Express.

Each format has its own options regarding items such as column organization and headings when saving. Experiment with the different formatting options to find the one that works best for you. To close the reporting tool, click on the "X" in the top right hand corner of its window.

Excluding appraisals in selected File Cabinet folders

It is very likely that you have reports in your system that you don't want showing up in your management reports. These could be report templates, old reports with incomplete data, test reports, you name it. The File Cabinet has a way to allow you to exclude entire folders from being included in the management reports.

In the File Cabinet, consolidate the files you want to exclude from management reports into one or more folders. See our chapter on ***"Managing Your Files"*** to learn how to create folders and move reports in a batch.

To exclude a whole folder from the management reports, click on the folder, then pull down the **Folder** menu and click the item that says **Exclude from management reports**. The folder will then appear with a red mark on it - that's how you'll know it is excluded from the management reports.

QuickBooks Integration

You can integrate your existing QuickBooks software with WinTOTAL to manage your appraisal office finances. This can save you the time and effort of making duplicate entries and monitoring your business from totally unrelated programs.

Individual folders may be excluded from management reports through a function in the File Cabinet's Folder menu. Once excluded, the folder will have a red tab on it.

Payments and Order Tracking

Using WinTOTAL's QuickBooks Interlink Wizard you can export the following office information into your QuickBooks program.

- Employees
- Customers
- Fees and services
- Invoices
- Payments

Requirements

In order to use this feature, you must have established within QuickBooks

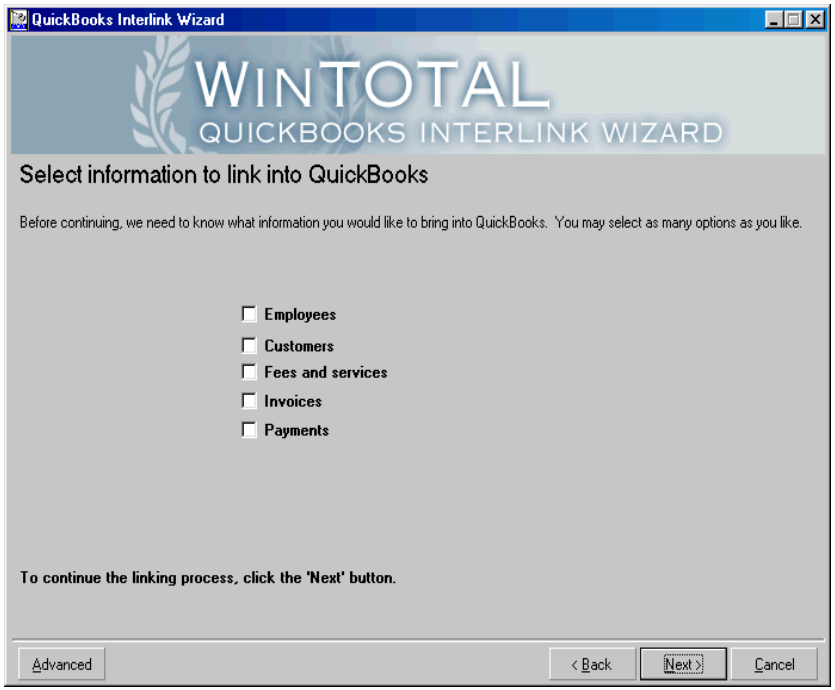
- a company
- an accounts receivable account
- an income account
- an asset accountO

Or, you must enter this information in the Interlink Wizard for import into QuickBooks.

Import Options

- The QuickBooks Interlink Wizard gives you the option to just create QuickBooks import records and perform standard error checking. You will then need to manually import the records you select into your QuickBooks program. To select an invoice, it must have a date in the **Bill Date** field.
- The QuickBooks Interlink Wizard can also automatically export records from Quickbooks, check for duplicate data, perform standard error checking, check for duplicate records, and import records into QuickBooks. You must have QuickBooks Pro 6.0, QuickBooks 2001 and QuickBooks Pro 2001 to use this feature.

The QuickBooks Interlink Wizard will create files with a .IIF extension within the **Win2000\QuickBks** folder on your sysetm. If you entered your financial information into the Interlink Wizard, an Acc.IIF file will be created containing this information. You will then need to import these files by opening QuickBooks, clicking on the **File** menu, selecting **Utilities**, and then **Import**.


QuickBooks Interlink Wizard
WINTOTAL
QUICKBOOKS INTERLINK WIZARD
Select information to link into QuickBooks
Before continuing, we need to know what information you would like to bring into QuickBooks. You may select as many options as you like.
Employees
Customers
Fees and services
Invoices
Payments
To continue the linking process, click the 'Next' button.
Advanced
< Back
Next >
Cancel

The QuickBooks Interlink Wizard is the first step to integrating your QuickBooks financial records with WinTOTAL.

Starting the QuickBooks Interlink Wizard

To access this feature from the Appraisal Desktop.

1. Click on the Management shortcut.
2. From the Management screen, click QuickBooks Link.
3. Choose to import the records into QuickBooks yourself, or to have the WinTOTAL QuickBooks Interlink Wizard to do it for you automatically.

As with all cross-product data conversions, unforeseen problems can arise. It is highly recommended that you that you backup your QuickBooks data before attempting the integration.

Note: a la mode, inc. does not provide technical support for issues within the QuickBooks program. For assistance, please contact Intuit.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

Configuration and Automated Tasks

Configuration and Automated Tasks

For as many appraisers as there are, there are just as many preferred work habits. This chapter is dedicated to showing you ways you can make WinTOTAL's defaults more transparent. Be sure to see the individual chapters on WinTOTAL's PowerViews to learn how to use the features we configure here. Most configuration items in WinTOTAL are "set and forget". So, the things you do in configuring are one-time operations.

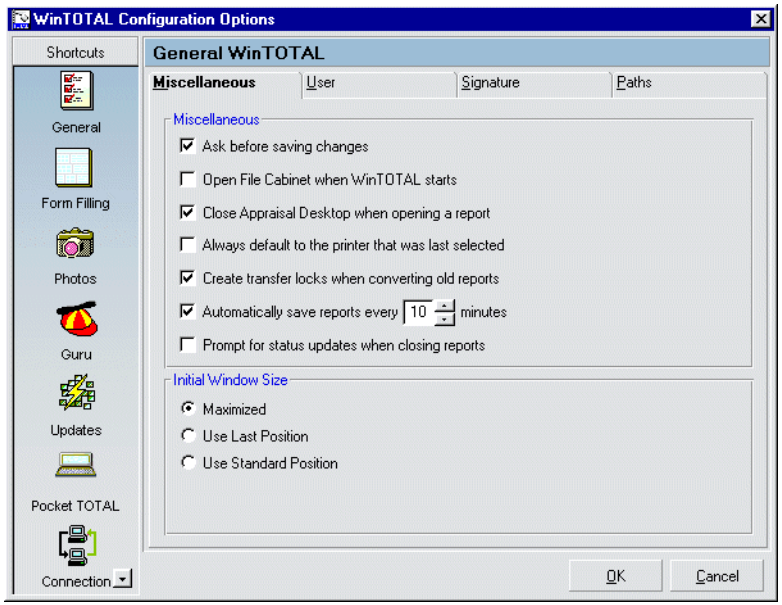
We'll mainly cover items under the Configure item of the Tools menu and cover items we may not have touched on in other chapters. In many cases, we will refer you to another chapter.

Customize WinTOTAL

We've centralized the configuration of WinTOTAL to make it easier for you as well as our support staff when needing to change options in the program. In WinTOTAL, click Tools and then Configure to get to our centralize configuration interface.

We've provided a scrolling list of categories on the side of this dialog that lead you to the various sections you can personalize.

- **General Configuration.** This area covers modules that go across multiple PowerViews and are general to the whole WinTOTAL system
- **Formfilling.** This sets up options pertaining to how WinTOTAL prompts you for various items as you fill out forms as well as default actions.
- **Photos**. Optimize default compression as well as file naming.
- **Guru.** Configure if and when automated tasks occur.
- **Updates.** Tell WinTOTAL at what time and which day of the week or month to get updates.
- **Pocket TOTAL.** Install and configure our software for handheld PC's. For more information on Pocket TOTAL, see our ***"Welcome to Pocket TOTAL"*** guide.
- **Connection.** Tell WinTOTAL how your system connects to the Internet.



The customizing of WinTOTAL has all been centered around one dialog, making it easy to get to the settings you use to personalize WinTOTAL.

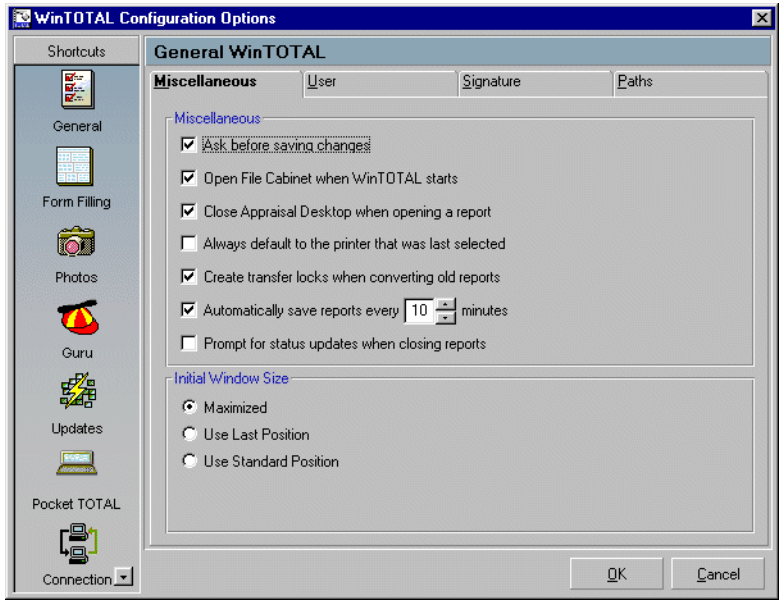
- **EDI Center.** Set up your mailbox and default options when sending and receiving EDI.
- **System.** Schedule the clean up of unused and temporary files.

General Configuration

Miscellaneous

Most of these items are fairly self-explanatory. Just setting a few of these options can save you from having to click to repeatedly confirm the same dialogs over and over during day to day operation of WinTOTAL.

- **Ask before saving changes**. The main reason to leave this on is for cases where you frequently open completed files and want to make sure you don't alter them. Otherwise, you may wish to turn this off - especially if you use our auto-save feature (described below) anyway.
- **Open File Cabinet when WinTOTAL starts.** For the sake of speed when starting WinTOTAL, you can leave this off. A fast way to get to files is to use the "Most Recently Used" list under WinTOTAL's File Menu.
- **Close Appraisal Desktop when opening a report.** This saves memory and system resources. The downside is you'll have to wait for it to load each time you bring up the file cabinet. Those that do most of their work inside the forms will leave this option enabled. You office support staff may wish to leave the Appraisal Desktop running all the time since they frequently will be in the File Cabinet and Management sections.
- **Always default to the last printer that was selected.** This conveniently sets your PC's default printer to the same one you last chose for a WinTOTAL function.
- **Create transfer locks when converting old reports.** WinTOTAL has a feature that enables you to "lock" fields in which you've overwritten items transferred from the main form. That way, these fields don't change every time you go to the minor form. Older versions of WinTOTAL didn't have this, so this option tells the program to "leave data as it is" when you open a file created before our Olympus generation.



The configuration options on this screen take away redundant clicks and streamline program operation.

- **Automatically save reports.** This keeps you from losing data due to system crashes or other unforeseen errors. It can cause inconvenient delays if your reports take a while to save due to many digital photos.
- **Prompt for status updates when closing reports.** If your office relies on WinTOTAL's status sending then you will want to check this option. If you only use status for billing purposes, then you'll need to remember to mark reports as complete. An added benefit to WinTOTAL's digital signatures is that when you sign the report, it is automatically marked as "complete".

User

On mutli-user systems, it is recommended that each user have his or her own profile they use when starting WinTOTAL. Many things such as database preferences and more as well as file locking are tied to the current user profile. These are described in ***"Networking WinTOTAL"***.

Signature

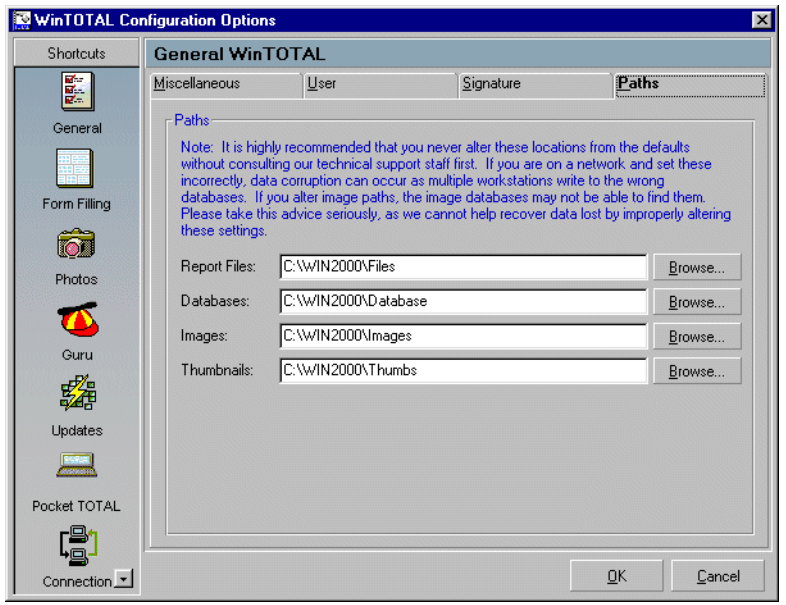
WinTOTAL has very powerful digital signature capabilities. Not only is it convenient to sign your whole report with just a couple of clicks, the report is also "locked" and encrypted. Digital signatures are described in the chapter on the ***"Form PowerView"***.

Paths

These are the directories in which WinTOTAL stores data files, images and databases. We do not recommend changing these from the defaults since data loss can result from invalid entries. Our support staff can also be more effective when they can work with things in the default directories.

Many people will want to separate the program files from the data files. That's very common. However, the size of the WinTOTAL installation compared to the data you generate and store in your databases is very small. You might as well keep the program on the same drive.

If you are an experienced user that has a high volume of appraisals, you may wish to consider using a different directory for digital photos every so often since storing two thousand or more photos in one directory can slow performance. This setting can be typically changed without ill consequences.



We don't recommend altering the default paths WinTOTAL sets up unless you are an expert user.

Formfilling Configuration

Data Entry

The recently used items are the last ten items ever typed in a field. This is a minimal form of automated data entry. Most users prefer the QuickLists for common responses since they can assign a hot-key as well as control the list. If you never use the drop downs near the field, you can speed performance by disabling them here.

If you find your self cloning a lot, it may be more convenient for the whole field to be selected when you jump into it. That way, your typing automatically overwrites what's in that field and you don't have to use CTRL+K to remove the data.

A new feature for Athena is the ability to have multiple QuickLists chained together in one field. This configuration screen enables you to decide the behavior of the cursor when you use a QuickList entry.

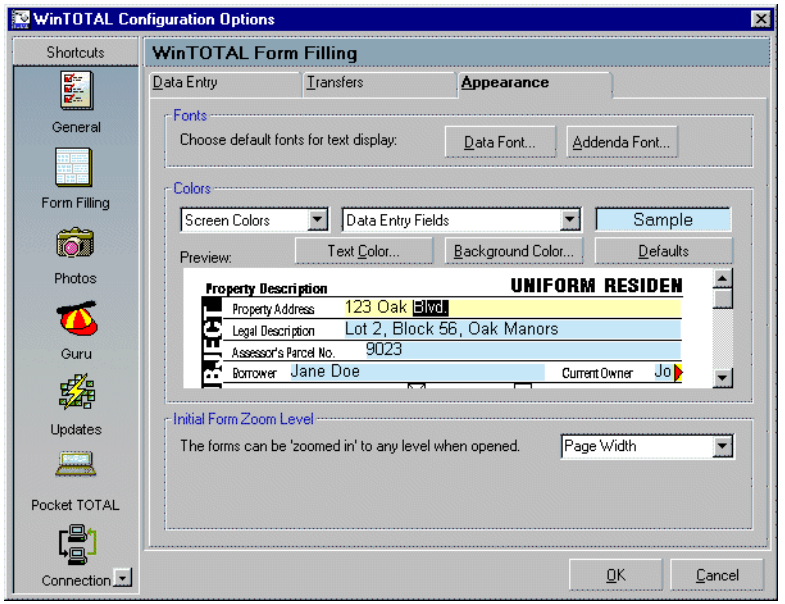
Transfers

WinTOTAL saves you a lot of data entry by transferring items to your minor forms. There may be rare instances where you don't want data transferred in, therefore, you can disable it in this screen.

Appearance

This is where you configure on screen appearance as well as printed appearance.

- **Fonts.** WinTOTAL stores a separate default for your forms and your addenda. It is recommended that you modify this setting instead of continually "selecting all" and changing the fonts manually!
- **Colors.** The first drop down list lets you choose screen colors or printed colors. You can actually choose color items for your forms and they will print as you specify if you use a color printer. The second drop-down lets you choose which element you are changing. If you lose track of your changes, you can always click the Defaults button to get them back to the installation defaults.
- **Initial Zoom Level.** Most of the time, you will want to leave this on Page Width. However, if you need the form zoomed in for better visibility, you can try other settings here.



WinTOTAL's on-screen and print colors may be configured independently.

Configuration and Automated Tasks

Guru, System and Updates

More than pop-up tutorials

The Guru actually does the automated things in WinTOTAL. Click the Daily tasks.. to see a list. These are items that are typically configured in their respective area of the program - i.e. EDI Center for automated Send and Receive.

File Collection

File Collection is a process that cleans up temp files used (and unused) by WinTOTAL.

- **Delete unused photos.** The image database tracks when you drag a photo from it to a form. If you take a lot of extra pictures, download them through QuickPix, then never use them, this utility can get rid of them.
- **Delete temp files.** This is a real disk space saver. WinTOTAL saves a second copy of every report on your system. Instead of.ZAP, it has an extension of .BZ1. It is simply there in case your ZAP file is damaged beyond repair. The File Cabinet can restore the BZ1 (See ***"Recovering lost reports"*** in the File Cabinet chapter) so you can at least get back to one version before the last saved file.
- **Delete used photos**. This deletes them from the database so they won't be in the way. The photos are still inside your appraisal reports. Use this if you have old photos you don't plan to reuse and want to save disk space.

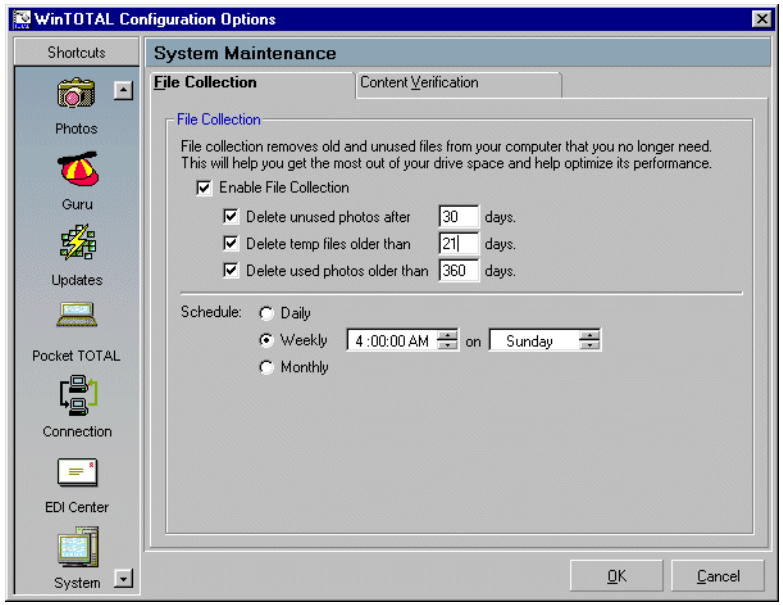
The schedule item simply specifies when to do these things.

Content Verification

Our Appraisal Desktop is HTML based in many places so it receives content from the web. Content Verification will enable WinTOTAL to connect to us online and get new, and always useful, data.

Updates

Part of your yearly membership fee goes towards getting updates at no extra charge throughout the year. These are typically new forms and enhancements to the program. Instead of forcing you to remember, we can connect periodically and get them for you. That way, if you forget and then an update is a "must have" you won't have your work interrupted



Our File Collection routines keep unnecessary files off your hard drive.

while a lengthy download takes place. When you get the updates as they come out, it is just a small download every time.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

Multi-User Guide and Networks

Networking WinTOTAL

WinTOTAL has been designed to run in a multi-user environment. Implemented properly, the benefits gained by sharing data, consolidating resources and centralizing management of the system are enormous.

a la mode has produced a video on Networking and Multi-User Installations. There's something in it for everyone from beginners to experienced network users. Call 1-800-ALAMODE to order one today!

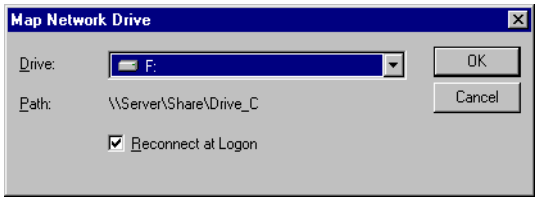
Network Installation

Pre-installation setup

- **Decide upon a server:** First, you will need to select which machine is going to be used as the "server". If you have a dedicated server (a machine which is not used by anyone directly for running applications like WinTOTAL), this is the obvious choice. If you do not have a dedicated machine available, select one of the computers on your network to be your server. For better performance in WinTOTAL, it is highly recommended that you use a dedicated server.
- **Map the network drive:** WinTOTAL requires logical drive mapping to function properly. This means that network drives that are to be used for WinTOTAL need to be mapped as physical drives, (For example, F:\) instead of a virtual drive (For example, \\Server\Share\Drive_C). *If you need assistance with basic Windows networking, you will need to contact a local network technician.*

It is vital that all workstations on the network "see" the server drive as the same drive letter (For example, F:\). Before mapping the drive for WinTOTAL, check all workstations to make sure that same drive letter is available on each. Any letter can be used as long as it does not represent a drive that already exists on one of the workstations.

When setting up a workstation to run WinTOTAL over a network, one very important thing you should do is "map" the server's drive to an actual drive letter on the client system.



Installing WinTOTAL on a network

If you are on a network, you can install WinTOTAL to the server from any workstation that has access to the networked drive. You don't have to be sitting at the server to run the installation. In fact, if you are using a dedicated server, it's better if you don't install directly to the server.

When prompted for the drive and directory for WinTOTAL, simply replace the default of C:\WIN2000 with F:\WIN2000 or another directory on your

network. The installation program will automatically add Windows shortcuts to your Start Menu.

To set up WinTOTAL on the workstations, do the following:

1. Click the **Start** button, and then select **Run**.
2. Type **F:\WIN2000\WINTOTAL.EXE** and click **OK**. *Remember to substitute the correct drive letter and path for your server in the above command.*
3. The Setup Wizard will appear. Follow the instructions on-screen to complete the installation on the workstation.

Our program is smart enough to detect whether or not WinTOTAL has ever been run from that workstation and will set up all the icons and necessary files. Repeat these steps for each workstation on your network. Once this is done, all workstations will have shared access to all of the files, databases, and images that are on the server.

Using a dedicated server

We strongly recommend a system with a dedicated server. Even if your network is “peer to peer”, there's nothing that says the server can't be treated as dedicated.

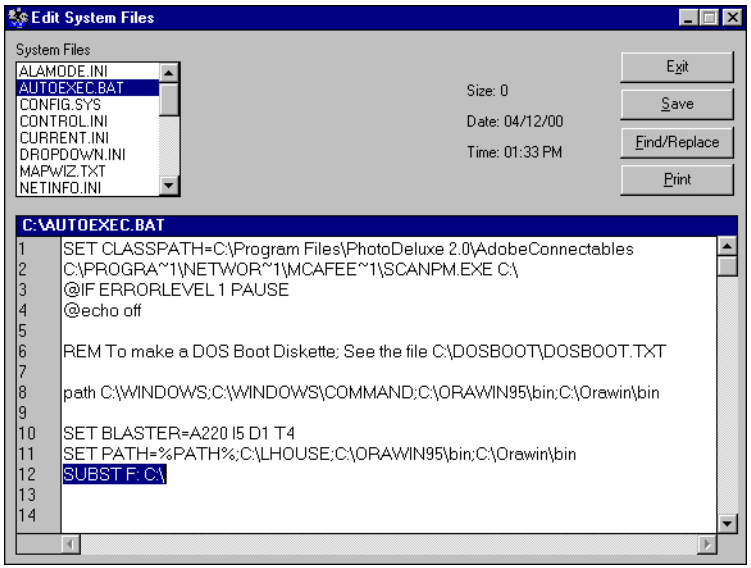
In theory, you should be able to use a network server as a workstation But in practice, we've seen it cause major network slowdowns and general unreliability when the server tries to handle requests from it's own console and through the network.

Setting up user profiles

User profiles handle personal settings and more importantly - file locking. If two people are logged into WinTOTAL with the same profile, you risk them opening the same file without warning. When two people open the same report simultaneously, the result is always errors and data loss. Each machine must log in with its own profile.

To set up user profiles, do the following:

1. From within a report, click on 3the **Tools** menu, and then select **Configure**. From the WinTOTAL Configuration Options screen, select the **User** tab.
2. You’ll see the user names you have established displayed. The current user will be highlighted. To change users, click **Set User**.



By adding the highlighted line to the AUTOEXEC.BAT file of your Windows 95 or 98 computer, you will add a “new drive” to your system that is an exact mirror image of your existing C:\ drive.

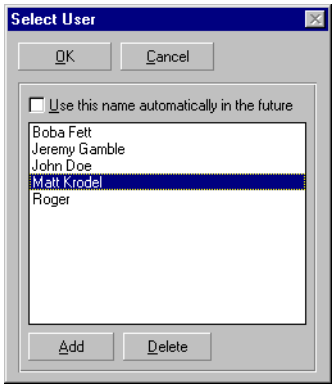
3. You should see a profile for every person on your network. If no profile names appear, click the **Add** button to create new profiles.

- *Notice the option labeled **Use this name automatically in the future***. This option exists so that people aren't prompted every time they start the program. On a network, we recommend a network administrator set up user profiles for every person through this dialog. Then, go to each machine and switch to the individual profile - enabling this option so there is no confusion in the future.
- *Note: After you change the user name, your QuickList comments may change*. You can switch back to another QuickList profile by selecting the **Change TextDB name** item in the **Edit** menu.

Common Installation Mistakes

Although networking the WinTOTAL software is fairly simple, there are a few things that should be avoided to ensure your installation works properly when implemented:

- **Do NOT map the network drive to the Win2000 folder in Network Neighborhood:** This is a common practice of many network technicians attempting to increase security. Doing this, however, will make some functions of the program inoperable. Be sure to map the network drive one level above the Win2000 folder so that the path appears similar to this: **F:\WIN2000**
- Make certain that ALL permissions are given to each user on the Win2000 folder and everything inside: Another common practice of network technicians for security purposes is to only assign the "necessary" permissions to users. While this may not affect most other programs, when using WinTOTAL, every user will be reading data from the folders, writing to and creating new files and folders, and even deleting files and folders on a daily basis. This is the nature of the program.
- Make certain to run the WINTOTAL.EXE file from the mapped drive and directory (F:\WIN2000), NOT through *Network Neighborhood*: Once the drive is mapped, be sure to use that drive letter, rather than *Network Neighborhood* to start the program. If this is not done properly, the program will still be running through a virtual path, and you may experience errors when trying to load the program such as



In a network environment, you should be certain that every user has their own profile for WinTOTAL. This will help to prevent database lockups and loss of data.

"Invalid Zip Argument" or "There are currently 0.00 Megabytes of free space available...".

Recovering from an Improper Installation

If you (or your technician) have followed the guidelines on the previous pages, WinTOTAL should run efficiently across all workstations on your network. But, what if the installation was not done according to these guidelines? You will want to rectify this as soon as possible.

There are three main "Improper Installation" types:

- WinTOTAL being run through a virtual path
- WinTOTAL installed on multiple machines on the network
- WinTOTAL installed on a workstation, instead of the server

Each of these installation types brings along its own set of problems, and has its own resolution.

Using a Virtual Path

Explanation of a virtual path

As we've said before, WinTOTAL requires logical drive mapping to function properly. This means that network drives that are to be used for WinTOTAL need to be mapped as physical drives, (*For example, F:*\) instead of a virtual drive (*For example,* *Server**Share**Drive_C*).

It is recommended that all workstations on the network "see" the server drive as the same drive letter (For example, F:\). Before mapping the drive for WinTOTAL, check all workstations to make sure that same drive letter is available on each. Any letter can be used as long as it does not represent a drive that already exists on one of the workstations. Consult your Network Administrator or a local technician for assistance with mapping a network drive.

Resetting WinTOTAL to run from the mapped drive

Once the drive is mapped, the contents of the ALAMODE.INI file that hold settings regarding directories must be cleared so that WinTOTAL can re-assign them properly.

1. At the workstation, click the **Start** button, and select the **Run** icon.
2. In the *Open* dialog, type **COMMAND**, and then click **OK**.

3. This will open an MS-DOS window with a blinking cursor in the top, left-hand corner. At the prompt, type:

`REN  %WINDIR%\ALAMODE.INI  ALAMODE.OLD` (Press **Enter**)

Note: You will lose all WinTOTAL settings after this command. If you have any shortcuts on your desktop pointing to WinTOTAL, delete them now, too. They will be pointing to the wrong location.

Next, you will need to reset the icons you use to run WinTOTAL and point them to your server. Here's how:

4. At the workstation, click the **Start** button, and select **Run**.
5. In the **Open** line, type
   F:\WIN2000\WINTOTAL.EXE INSTALL
   and then click **OK**.

   If your server drive is not F:\, substitute the appropriate drive letter in the above command.

The Setup Wizard will appear. Follow the on-screen instructions to complete the installation. When the installation is finished, it will create new icons in your Start menu. Use these icons to start WinTOTAL, and the program should open error free.

Multiple Local Installations

Explanation

This is possibly the most problematic type of improper installation you may encounter. Because the program is being run locally, all of the files, databases, images, etc. are most likely being loaded from each individual machine, isolating each workstation from everyone else, and not allowing anyone to benefit from other users' efforts.

In order to resolve this kind of configuration, you will need to combine all of the local installations onto a single server machine. While this process will safely retain all of your report files and user configurations, doing this may cause some users on your network to lose some of their database entries (text, images, comps, etc.). *This is a direct result of having local copies of the program installed in a network environment*.

This process is not supported by a la mode's Technical Support staff, and a la mode is not responsible for any data lost when following the steps

below. If you are uncomfortable with completing any of these steps, you should contact a certified technician in your area for further support.

Migrating from multiple local installs

Merging multiple installations to one server requires the following:

1. Installing the WinTOTAL program to the server
2. Reconfiguring the workstations to run from the server
3. Saving user configurations to the server
4. Copying the “best” text database to the server
5. Moving the report files to the server
6. Copying/Rebuilding the comps and images databases to the server

Step 1 - Installing the WinTOTAL program to a single server

This step should be done according to the instructions set forth in the first four pages of this chapter.

Step 2 - Reconfiguring the workstations to run from the server

The following procedures will keep your workstations from running their local copies. Replace the appropriate drive letters for your network where necessary:

1. At the workstation, click the **Start** button, followed by **Programs**, and the **WinTOTAL** program group, and then the **Tech Support Assistant** icon.
2. Click the **Editor** button in the top, right-hand corner of the *a la mode Technical Assistant* window.
3. Once in the *Edit System Files* window, click the button labeled **Find/ Replace**.
4. In the line labeled *Find What*, type **C:\WIN2000**. In the line labeled *Replace With*, type **F:\WIN2000**. Then click the **Replace All** button.
5. Click **Exit** to exit the *Edit System Files* window, and then click **Done** to exit the *Tech Support Assistant*.

Note: If you have any shortcuts on your desktop pointing to WinTOTAL, delete them now. They will be pointing to the wrong location.

Next, you will need to reset the icons you use to run WinTOTAL and point them to your server. Here's how:

6. At the workstation, click the **Start** button, and select **Run**.
7. In the field labeled **Open**, type
   F:\WIN2000\WINTOTAL.EXE INSTALL
   and click **OK**.

   If your server drive is not F:\, substitute the appropriate drive letter in the above command.
8. The Setup Wizard will appear. Follow the on-screen instructions to complete the installation.

Repeat the steps above for each workstation on your network.

Step 3 - Saving user configurations to the server

Now that you have configured the workstations to run WinTOTAL from a single copy on the server, you will want to copy your user settings from each local computer to the server. These settings include your common response database and putting your user name on the list of users. Here's how to do this:

Note: If the same user name is set up on more than one local copy of WinTOTAL, you may overwrite user settings on the server. This is a direct result of having local copies of the program installed in a network environment. a la mode, inc. is not responsible for loss of data when following these instructions.

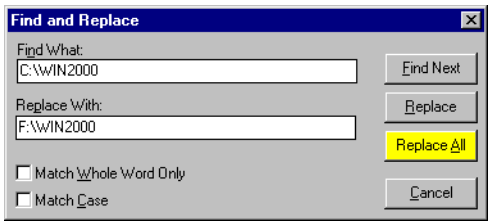
1. At the workstation, click the **Start** button, and select the **Run** icon.
2. In the **Open** dialog, type **COMMAND**, and then click **OK**.
3. This will open an MS-DOS window with a blinking cursor in the top, left-hand corner. At the prompt, type:

`XCOPY C:\WIN2000\USERS F:\WIN2000\USERS /E /Y`
(Press **ENTER**)

`XCOPY C:\WIN2000\NETWORK F:\WIN2000\NETWORK /E /Y`
(Press **ENTER**)

`EXIT` (Press **ENTER**)

Repeat steps 1-3 for each workstation from which you want to transfer local user settings.



*Click **Replace All** to remove any references in this WinTOTAL configuration file to the installation on your computer.*

Step 4 - Copying the "best" text database to the server

Once all of the workstations have been set up properly, you will have to make a decision. You must choose which text database you want to keep. You will only be able to use one copy of this database on the server. *Again, this is a direct result of having multiple local copies in a network environment*. For example, if there were four workstations on the network running local copies of WinTOTAL, then three of these people are going to lose their databases. We suggest using the database that contains the most entries.

The following steps explain how to copy a database from a local computer to the server.

Note: All users must exit WinTOTAL before moving the database to the server. Again, these steps assume that WinTOTAL is installed to F:\WIN2000 on the network server, and C:\WIN2000 is the old local directory of WinTOTAL. If this is not the case on your network, please substitute the appropriate drive letters/paths:

1. At the workstation, click the **Start** button, and select the **Run** icon.
2. In the **Open** dialog, type **COMMAND**, and then click **OK**.
3. This will open an MS-DOS window with a blinking cursor in the top, left-hand corner. At the prompt, type:

For the Residential comparables database type:

`C:` (Press **ENTER**)

`CD\WIN2000\DATABASE` (Press **ENTER**)

`COPY TEXTDB.MDB F:\WIN2000\DATABASE /Y` (Press **ENTER**)

`EXIT` (Press **ENTER**)

Step 5 - Moving the report files to the server

The safest way to copy all of your reports onto the server is to:

- Open up the Appraisal Desktop's File Cabinet.
- Create a new folder for your reports.
- Attach an external directory to the folder that contains your reports.
- Use the Move/Copy command.

Using this method keeps the threat of overwriting data to a minimum, and reduces the amount of cryptic commands and procedures you would have to follow. *Again, these steps assume that WinTOTAL is installed to F:\WIN2000 on the network server, and C:\WIN2000 is the old local directory of WinTOTAL. If this is not the case on your network, please substitute the appropriate drive letters/paths in the following instructions.* Here's how to do this:

1. Open WinTOTAL from your network installation. The Appraisal Desktop window should appear. If this does not happen, click the **Open** button at the top of the *TOTAL for Windows* window.
2. From within the Appraisal Desktop, click the **Options** menu at the top of the window and select **Attach Directory** from the drop-down list.
3. The *Attach Directory* dialog will appear, displaying a directory tree of all available drives and folders available from your computer.
4. Browse to the drive or folder you wish to attach as a folder within the Appraisal Desktop.

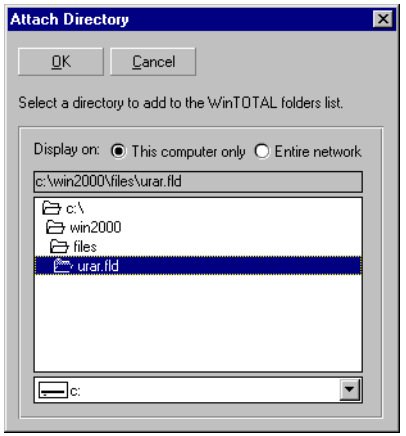
Example: if your reports are on drive C:\ in the folder called URAR, you would want to select the C:\ drive and double-click on the WIN2000 folder, then the Files folder, and then the URAR.FLD directory.

5. Click OK to attach the directory.

The Appraisal Desktop will prompt you for a name for the attached directory. By default, it will use the path of the directory. However, you can name it whatever you wish. Click **OK** when you've named the folder.

The Appraisal Desktop will show the attached directory with a 'computer' icon. Treat that directory just as if it were another folder in the Appraisal Desktop. Now either create a new folder for your reports, or select an existing folder from the Appraisal Desktop. After that, all you need to do is copy the reports from the attached directory to the folder that you have selected.

6. Highlight the attached directory you created in steps 1-5.
7. Click on the first report, hold down the **SHIFT + CTRL + END** keys on your keyboard. This will highlight the entire group of report files.
8. Click on the button marked **Move/Copy** at the top of the Appraisal Desktop window.



In the Attach Directory dialog, be sure to browse to the folder where your reports are currently stored. Each folder which contains reports in the File Cabinet will have an FLD extension (URAR.FLD).

9. The *Select Folder* dialog will appear, displaying a list of the folders on your Appraisal desktop.
10. Double-click on the folder name you selected above.
11. Repeat steps 1-10 for each folder that contains reports that need to be copied from your local hard drive to the server.
12. After copying all of these files, you should disconnect each of the attached directories to prevent any confusion. To do this click once on the attached directory you created in steps 1-5 above to highlight it, and then click the **Folder** menu and select **Delete**. *Note: The folder still exists, you're simply "hiding" it from view.*

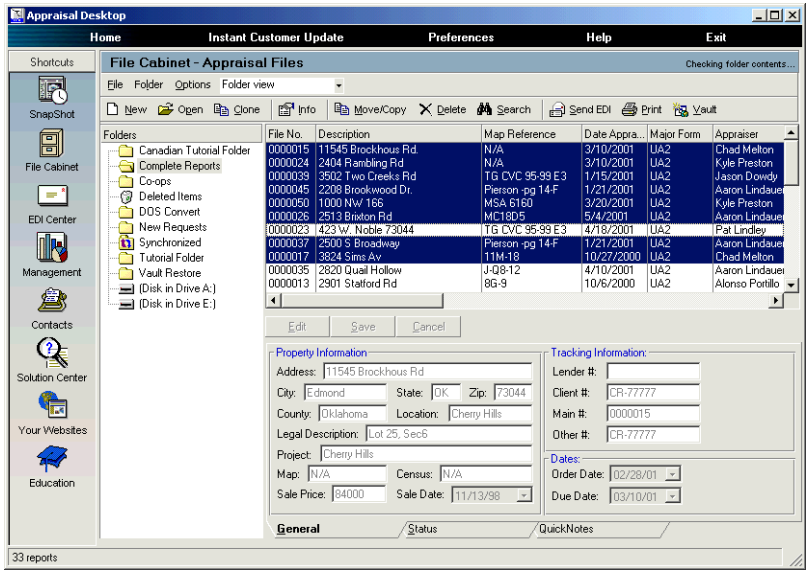
Be sure that the confirmation window asks if you want to disconnect, and click on Yes.

Note: If you select a folder instead of the attached directory, you may delete your reports and be unable to recover them.

Step 6 - Creating shared comps and images databases

This step involve your making a decision. You can either:

- *One - Start brand new, empty databases, and then let WinTOTAL automatically rebuild the databases for you from your reports*. This option will completely rebuild both your comps and your images databases with information that is already contained in your reports. The only drawback to doing this is that, any images or comparables that have never been used in any report will not be added to your new databases. This is the preferred option, as it is faster and more effective.
- *Two - Copy your images and/or comps databases from one of your workstations to the server*. This option will give you databases that are already populated with information, but it will only be from *one* of the workstations on the network. You will be giving up any other database information stored on other workstations. You should use this option only if you have been manually entering several comparables/images that have not been used in any of your reports. If you wish to use this method, skip to ***"Option #2: Copying a comps and/or image database to the server"*** on page 12.


Appraisal Desktop
Home
Instant Customer Update
Preferences
Help
Exit
Shortcuts
SnapShot
File Cabinet
EDI Center
Management
Contacts
Solution Center
Your Websites
Education
File Cabinet - Appraisal Files
File Folder Options Folder view
New Open Clone Info Move/Copy Delete Search Send EDI Print Vault
Folders
Canadian Tutorial Folder
Complete Reports
Co-ops
Deleted Items
DOS Convert
New Requests
Synchronized
Tutorial Folder
Vault Restore
(Disk in Drive A:)
(Disk in Drive E:)
File No. Description Map Reference Date Appra... Major Form Appraiser
0000015 11545 Brockhous Rd. N/A 3/10/2001 UA2 Chad Melton
0000024 2404 Rambling Rd N/A 3/10/2001 UA2 Kyle Preston
0000039 3502 Two Creeks Rd TG CVC 95-99 E3 1/15/2001 UA2 Jason Dowdy
0000045 2208 Brookwood Dr. Pierson -pg 14-F 1/21/2001 UA2 Aaron Lindauer
0000050 1000 NW 166 MSA 6160 3/20/2001 UA2 Kyle Preston
0000026 2513 Brixton Rd MC18D5 5/4/2001 UA2 Aaron Lindauer
0000023 423 W. Noble 73044 TG CVC 95-99 E3 4/18/2001 UA2 Pat Lindley
0000037 2500 S Broadway Pierson -pg 14-F 1/21/2001 UA2 Aaron Lindauer
0000017 3824 Sims Av 11M-18 10/27/2000 UA2 Chad Melton
0000035 2820 Quail Hollow J-Q8-12 4/10/2001 UA2 Aaron Lindauer
0000013 2901 Statford Rd 8G-9 10/6/2000 UA2 Alonso Portillo
Edit Save Cancel
Property Information
Address: 11545 Brockhous Rd
City: Edmond State: OK Zip: 73044
County: Oklahoma Location: Cherry Hills
Legal Description: Lot 25, Sec6
Project: Cherry Hills
Map: N/A Census: N/A
Sale Price: 84000 Sale Date: 11/13/98
Tracking Information
Lender #:
Client #: CR-77777
Main #: 0000015
Other #: CR-77777
Dates:
Order Date: 02/28/01
Due Date: 03/10/01
General Status QuickNotes
33 reports

By using basic Windows keyboard commands, or keyboard and mouse combinations, you can select multiple entries at one time to move to your new File Cabinet folders.

*- **SHIFT+CTRL+END** selects everything from the entry highlighted to the last entry in the list.*
*- **SHIFT+Click** selects everything between the entry highlighted and the entry you click on.*
*- **CTRL+Click** individually selects multiple items in a list with each click*

Option #1: Importing images and comps from reports

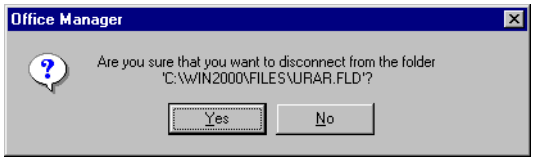
To begin the import process, do the following:

1. Start WinTOTAL - it should be running from your network drive now.
2. Open a report in WinTOTAL (it doesn't matter which report).
3. Click the **PowerViews** menu, then select **Comps PowerView**.
4. In the **Comps PowerView** window, click the **Open Database** button to load the comps Database.
5. In the WinTOTAL - comps Database window, click the **Insert** button at the top.
6. In the *Import Comparables* window, first make sure that the option labeled **Import photos with comps** under the *Additional Import Information section* has a checkmark next to it.
7. Under the *File Cabinet Folders* section, you will see a list of all folders that are available in your File Cabinet. Select the folder(s) which contain(s) your reports and click the **Mark** button to the right. You will notice a small, red check mark applied to each folder you mark in this way.
8. Once you have marked all of the folders you need, click the **OK** button in the top, left corner of the dialog.

WinTOTAL will then begin importing all of the comparables that are in each of the reports stored in the File Cabinet folders you have marked. At the same time, it will extract a copy of each comparable's photo from the reports and add it to your images directory and Image Database.

During this process, you may be prompted for additional comparable information. While this information is not required, it will help to keep your Comparable Database as complete as possible. You may also be presented with dialogs that indicate that a **Duplicate Comparable** was found. When a comparable in one of the reports matches one that is already in your database, you are given four options:

- **Add** a second copy of the same comparable to the database
- **Update** the comparable in the database with the information found in the report
- **Skip** the duplicate comparable found



*Be sure that this dialog appears when you **Delete** your attached directory. If you are not prompted to "disconnect", you may be deleting one of your main Appraisal Desktop folders, and all of the reports it contains.*

- **Cancel** the importing process

Once the import process is complete, you will be able to place your comparables into reports directly from WinTOTAL's Comparables Database, and the image(s) associated with it will be placed on the appropriate form automatically.

Option #2: Copying a comps and/or image database to the server

For this procedure, you will need to choose which copy of the databases you want to keep. You will only be able to use one copy of these databases on the server. *Again, this is a direct result of having multiple local copies in a network environment.* This step is divided into three sections:

- Copying your "best" comps/images database to the server.
- Copying your images to the server.
- Modifying the images database to track your images in their new location.

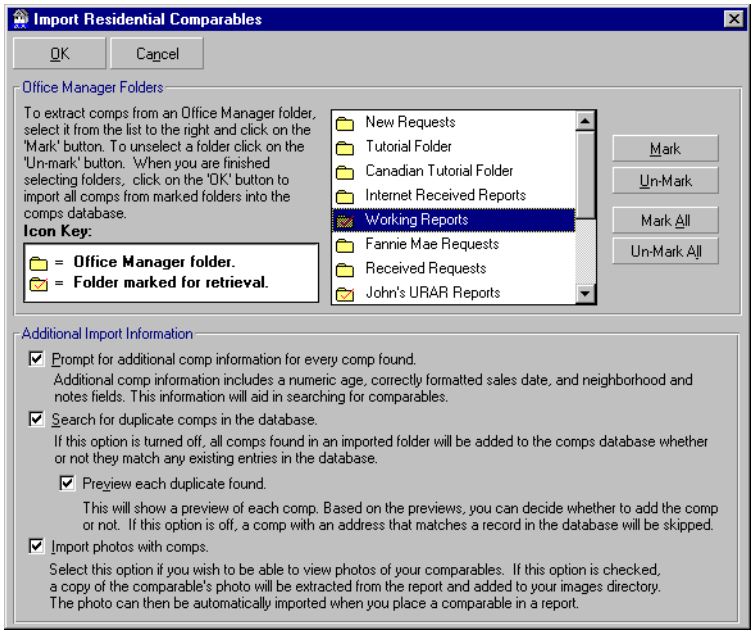
Copying your "best" comps/images database to the server

Note: All users must exit WinTOTAL before moving the database to the server. Again, these steps assume that WinTOTAL is installed to F:\WIN2000 on the network server, and C:\WIN2000 is the old local directory of WinTOTAL. If this is not the case on your network, please substitute the appropriate drive letters/paths:

1. At the workstation from which you want to copy the comps/images database, click the **Start** button, and select the **Run** icon.
2. In the **Open** dialog, type **COMMAND**, and then click **OK**.
3. This will open an MS-DOS window with a blinking cursor in the top, left-hand corner. See the table on the right for the proper commands to move your database files.

Copying your images to the server

Here are the steps that need to be taken to copy the images from your local hard drive to the server. *If there are images on the server with the same file names as on workstations, you will be prompted whether to overwrite the file*. We would recommend renaming the image files on each workstation so that the names are unique. While this will preserve


Import Residential Comparables
OK
Cancel
Office Manager Folders
To extract comps from an Office Manager folder, select it from the list to the right and click on the 'Mark' button. To unselect a folder click on the 'Un-mark' button. When you are finished selecting folders, click on the 'OK' button to import all comps from marked folders into the comps database.
Icon Key:
= Office Manager folder.
= Folder marked for retrieval.
New Requests
Tutorial Folder
Canadian Tutorial Folder
Internet Received Reports
Working Reports
Fannie Mae Requests
Received Requests
John's URAR Reports
Mark
Un-Mark
Mark All
Un-Mark All
Additional Import Information
Prompt for additional comp information for every comp found.
Additional comp information includes a numeric age, correctly formatted sales date, and neighborhood and notes fields. This information will aid in searching for comparables.
Search for duplicate comps in the database.
If this option is turned off, all comps found in an imported folder will be added to the comps database whether or not they match any existing entries in the database.
Preview each duplicate found.
This will show a preview of each comp. Based on the previews, you can decide whether to add the comp or not. If this option is off, a comp with an address that matches a record in the database will be skipped.
Import photos with comps.
Select this option if you wish to be able to view photos of your comparables. If this option is checked, a copy of the comparable's photo will be extracted from the report and added to your images directory. The photo can then be automatically imported when you place a comparable in a report.

*The **Import Comparables** dialog includes several options for how to import your data. **For the fastest import, leave only the box for** Import photos with comps **selected. If you want to be thorough with your data entry, make sure that the Prompt for additional comp information for every comp found** option is selected. It is recommended that you leave the option labeled **Search for duplicate comps in the database** selected so that you don't have several copies of the same comparable in your database.*

every image, it will make entries to your image database invalid. The renamed images will not be found in the database.

As mentioned before, this is a direct result of having multiple local copies in a network environment (and in violation of the licensing agreement). a la mode is not responsible for loss of data following these instructions.

Note: These steps assume that F:\WIN2000 is the directory of the network install and C:\WIN2000 is the old local directory of WinTOTAL. Please substitute the appropriate drive letters in the following instructions.

1. At the workstation, click the **Start** button, and select the **Run** icon.
2. In the **Open** dialog, type **COMMAND**, and then click **OK**.
3. At the DOS prompt, type:

`COPY C:\WIN2000\IMAGES\*.*  F:\WIN2000\IMAGES`
(Press **ENTER**)

`EXIT` (Press **ENTER**)

Repeat steps 1-3 on each workstation.

Modifying the images database to find your images in their new location

Once the databases and the images have been moved, you will need to modify the images database in order to find the images in their new location. To do this requires that you open the database in the Visual Data program included with WinTOTAL to modify the list of folders used in the database.

Once again: a la mode cannot support this procedure, and is not responsible for any data lost as a result of modifying your database. If you are uncomfortable modifying your image database, you should contact a local technician to make the appropriate changes.

These steps assume that F:\WIN2000 is the directory of the network install and C:\WIN2000 is the old local directory of WinTOTAL. Please substitute the appropriate drive letters in the following instructions.

The following steps will edit the database to point to the new image location:

1. At the workstation, click the **Start** button, and select the **Run** icon.
2. In the **Open** dialog, type **F:\WIN2000\VISDATA**, and click **OK** to start the Visual Data application.

For the Residential comps database type:

`C:` (Press **ENTER**)

`CD\WIN2000\DATABASE` (Press **ENTER**)

`COPY RESCOMPS.MDB  F:\WIN2000\DATABASE /Y`
(Press **ENTER**)

`EXIT` (Press **ENTER**)

For the Commercial comps database type:

`C:` (Press **ENTER**)

`CD\WIN2000\DATABASE` (Press **ENTER**)

`COPY CMRCOMPS.MDB  F:\WIN2000\DATABASE /Y`
(Press **ENTER**)

`EXIT` (Press **ENTER**)

For the images database type:

`C:` (Press **ENTER**)

`CD\WIN2000\DATABASE` (Press **ENTER**)

`COPY W2IMAGES.MDB  F:\WIN2000\DATABASE /Y`
(Press **ENTER**)

`EXIT` (Press **ENTER**)

3. Inside *Visual Data* click the **File** menu, choose **Open Database** and then **MS Access**.
4. In the *Open MS Access Database* window, under the **Folders** heading in the middle, scroll down and double-click the **Database** folder.
5. Under the *File name* section, scroll to the file named **W2IMAGES.MDB**. Click on that file once to highlight it and click the **OK** button.
6. With the W2IMAGES.MDB database open, you will see the T*ables/ Queries:* window with two selections: **Folders** and **Images**. Click once on **Folders** to highlight it and click **Open**.
7. Now, inside the *Table: Folders* window, click the **Edit** button.
8. The **FILEPATH** can now be edited to point to the new location of the images.

(*Example: if the images have been moved from the **C:** drive to the **F:** drive, the path would be changed from **C:\WIN2000\IMAGES** to **F:\WIN2000\IMAGES***.)

9. With the path changed to reflect the new path, click the **Update** button.

Note: This will bring you back to the previous window. If there are multiple records that need to be edited, click on the button to take you to the next record, and repeat steps 7 through 9 for each record.

10. Once you've updated all of the necessary records in the *Table: Folders* window, click the **Close** button.
11. Now click the **File** menu and choose **Exit**.

Your images database should now be able to find all of the images on your network server.

That's It

Once you've completed the above steps on all of your workstations, your network should be configured for maximum efficiency.

Moving From a Local Install to a Shared Server

Explanation

This type of installation happens for a variety of reasons. Commonly, one person will have the program installed, when the company determines it would be beneficial to network several computers together. In this case, many times, a one computer becomes designated as the server (usually not the same computer where WinTOTAL is already installed), and everyone wants to run the WinTOTAL program from the server.

To move a single installation of WinTOTAL from one workstation to a server, you will need to first move all of the program and data files over, and the, you will need to modify the image database to locate your images in their new location.

Moving the program and data files to the server

There is a simple DOS command you can use to copy the WinTOTAL directory from one hard drive to another. Before you begin, though, read the section of this document devoted to backing-up your files. Backing up is mentioned simply as a precaution, and is not a requirement. It does however, insure that you will always have a copy of your reports, and it can ease the process of restoring WinTOTAL to the new hard drive.

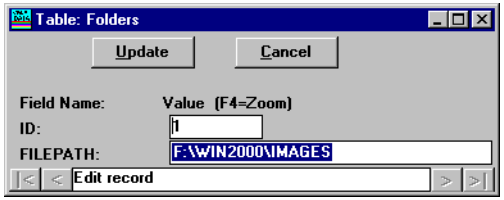
1. At the workstation, click the **Start** button, and select the **Run** icon.
2. In the **Open** dialog, type **COMMAND**, and then click **OK**.
3. This will open an MS-DOS window with a blinking cursor in the top, left-hand corner. At the prompt, type:

`MD F:\WIN2000` (Press **ENTER**).

`XCOPY C:\WIN2000 F:\WIN2000 /E` (Press **ENTER**).

Note: If your server drive is not F:\, replace F:\ with the appropriate drive letter in the above commands.

Your only other concern at this point is to adjust the ALAMODE.INI in the C:\WINDOWS directory. This file contains all the paths WinTOTAL uses to access your reports, text database comments, and images, among other things. To do this, do the following:



*Be sure to change the **FILEPATH** to point to the new location in which your images are stored.*

If there are multiple records, make certain that you have updated all of them before exiting the Visual Data application.

4. At the workstation, click the **Start** button, followed by **Programs**, and the **WinTOTAL** program group, and then the **Tech Support Assistant** icon.
5. Click the **Editor** button in the top, right-hand corner of the *a la mode Technical Assistant* window.
6. Once in the *Edit System Files* window, click the button labeled **Find/ Replace**.
7. In the line labeled *Find What*, type **C:\WIN2000**. In the line labeled *Replace With*, type **F:\WIN2000**. Then click the **Replace All** button. Click **Exit** to exit the *Edit System Files* window, and then click **Done** to exit the *Tech Support Assistant*.

Note: If you have any shortcuts on your desktop pointing to WinTOTAL, delete them now. They will be pointing to the wrong location.

Next, you will need to reset the icons you use to run WinTOTAL and point them to your server. Here's how:

8. At the workstation, click the **Start** button, and select **Run**.
9. In the **Open** line, type **F:\WIN2000\WIN2000 INSTALL** and then click **OK**.

If your new drive is not F:\, substitute the appropriate drive letter in the above command.

10. The Setup Wizard will appear. Follow the on-screen instructions to complete the installation.

Once you are sure that WinTOTAL is functioning properly on the new hard drive, you can delete the old WIN2000 directory on the C:\ drive.

Modifying the image database to find images in their new location

When you download pictures through QuickPix, an entry is written to the image database that tracks where those images are stored on your hard drive (e.g. C:\WIN2000\IMAGES). If you move those images to a new hard drive or directory (D:\ or E:\), the database will still look for the images in the original location marked in the database. This is one of the reasons for having the new hard drive installed as the C: drive and copying WinTOTAL over to it. When moved to another C:\ drive all that changes is the available disk space.

Once the databases and the images have been moved, you will need to modify the images database in order to find the images in their new location. To do this requires that you open the database in the Visual Data program included with WinTOTAL to modify the list of folders used in the database.

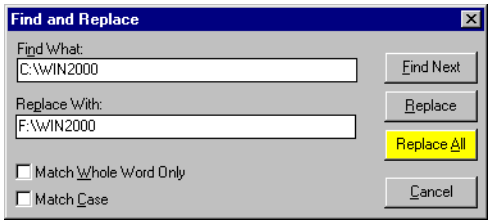
a la mode cannot support this procedure, and is not responsible for any data lost as a result of modifying your database. If you are uncomfortable modifying your image database, you should contact a local technician to make the appropriate changes.

These steps assume that D:\WIN2000 is the directory of the new/network install and C:\WIN2000 is the old local directory of WinTOTAL. Please substitute the appropriate drive letters in the following instructions.

The following steps will edit the database to point to the new image location:

1. At the workstation, click the **Start** button, and select the **Run** icon.
2. In the **Open** dialog, type **F:\WIN2000\VISDATA**, and click **OK** to open Visual Data.
3. Inside Visual Data click the **File** menu, choose **Open Database** and then **MS Access**.
4. In the *Open MS Access Database* window, under the **Folders** heading in the middle, scroll down and double-click the **Database** folder.
5. Under the *File name* section, scroll to the file named **W2IMAGES.MDB**. Click on that file once to highlight it and click the **OK** button.
6. With the W2IMAGES.MDB database open, you will see the *Tables/ Queries:* window with two selections: **Folders** and **Images**. Click once on **Folders** to highlight it and click **Open**.
7. Now, inside the *Table: Folders* window, click the **Edit** button.
8. The **FILEPATH** can now be edited to point to the new location of the images.

(Example: if the images have been moved from the C: drive to the D: drive, the path would be changed from C:\WIN2000\IMAGES to D:\WIN2000\IMAGES.)



*Click **Replace All** to remove any references in this WinTOTAL configuration file to the installation on your computer.*

9. With the path changed to reflect the new path, click the **Update** button.

Note: This will bring you back to the previous window. If there are multiple records that need to be edited, click on the button to take you to the next record, and repeat steps 6 through 8 for each record.

10. Once you've updated all of the necessary records in the *Table: Folders* window, click the **Close** button.
11. Now click the **File** menu and choose **Exit**.

Your images database should now be able to find all of the images on your network server.

General Questions

When would I need a network? Can't I just install WinTOTAL on all of the computers in my office?

If you have several people in your office needing to run WinTOTAL at the same time, then you should get a network.

- Even though the WinTOTAL installation disks are not copy protected, it is against our licensing agreement to run it on two separate computers at the same time; therefore, you can not legally install it on several computers for several appraisers to use simultaneously. Think of it like a book: Two people can't read a book in two places at the same time.
- If you have several appraisers in your organization with separate PC's, you should either network those PC's or buy additional WinTOTAL licenses from a la mode. Our technicians are authorized to not support your program if we know it's on multiple PC's.

In plain terms, this sounds kind of rough, but it is actually very standard for all types of software. When you consider the fact that we don't charge extra for the network capabilities as our competitors do and that extra licenses are at a greatly reduced price, it's very reasonable and lenient.

What's the difference between installing WinTOTAL on a network server and on separate PC's?

When WinTOTAL is on a network server, then all of the program files, forms, databases and program settings are in one location. It's very

convenient for you by allowing you to share your data with other appraisers in the office, thereby saving time and effort. It also keeps all billing and management features centralized and convenient.

Another benefit to networking is that it makes technical support easier, since we can trace any problems down to one location. For example, if a function works as intended on workstation and not another, it can be logically deduced that there is nothing wrong with the WinTOTAL program files. Our technicians then know to look for things like device drivers that can change from workstation to workstation.

Can WinTOTAL be installed to the local "C" drive with simply the files directory pointing to the network?

Absolutely not! In order for Appraisal Desktop functions to work properly - specifically, keeping the various entries for appraisers, lenders and clients accurate - WinTOTAL needs to be run from the network server. The lookups for appraisers, lenders and clients are stored in the program directory. This is required in order to make a comprehensive billing module work.

When a data file is opened, WinTOTAL checks to see if it was created on the same system. (It uses your customer number.) If so, it matches the ID codes for the appraisers and clients with those in the program directory. **Therefore, if you have multiple local installations using the same customer number sharing only a common data directory, you risk getting erroneous data in your appraiser and client fields.**

Installing WinTOTAL on several "C" drives in a networked office is also in violation of our License Agreement and nullifies your support contract. (Have we convinced you not to do this yet?)

Do I need a special version of WinTOTAL if I plan to run it on a network? Does WinTOTAL run differently on a network?

No. We took extra steps to make WinTOTAL a multi-user program right out of the box. WinTOTAL always loads user configuration files when you start it so that it can retain settings for each profile. On a stand alone system, there is typically just one configuration file.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

File Conversions

File Conversions

WinTOTAL has extensive conversion capabilities implemented to keep you from "starting from scratch" when you switch to WinTOTAL. As you'll read in this chapter, batch conversions are available and easy to use. However, we recommend that you convert reports for the express purpose of using them for templates - eliminating the need to retype data.

After converting reports, you may even wish to create Quicklists from items you already have typed into forms (described in the chapter titled ***"Welcome to Athena"***) or build a comps database (described in the ***"Comps PowerView"*** chapter of this guide.).

Upgrading from competing systems

Importing a group of URAR files at once

WinTOTAL's batch conversion utility offers the ability to convert URAR and addenda data from most competing appraisal software systems:

- **ACI/PDSI** (Both DOS and Windows versions)
- **Bradford** (Windows version only)
- **CRAL** (Windows version only)
- **Day One** (Both DOS and Windows versions)
- **HighPerForm** (Both DOS and Windows versions)
- **MCS** (DOS version only)
- **Residential Appraiser** (Both DOS and Windows versions)
- **Wilson** (Windows version only)

To begin the batch conversion process, do the following:

1. From within WinTOTAL, click Tools and select **Convert...**This will start the *Conversion Wizard*.
2. Select the software package from which you are converting in the drop-down list to the right and click **Next**.
3. You will be prompted for the location of the files you want to convert, as well as the location to which you want to save your newly converted reports.

WinTOTAL Conversion Wizard
WINTOTAL
CONVERSION WIZARD
Welcome to the WinTOTAL Conversion Wizard!
This wizard will convert non-a la mode appraisal files to WinTOTAL. On the following screens, you'll be able to select the location of the report files you wish to convert. You'll then have the opportunity to select as many or as few files you wish converted. To start, select the appraisal package used to create the files you now wish to convert and click 'Next' to continue.
Convert reports from the following software package:
ACI/PDSI (DOS)
ACI/PDSI (DOS)
ACI/PDSI (Windows)
Bradford (Windows)
CRAL (Windows)
Day One (DOS)
Day One (Windows)
HighPerForm (DOS)
HighPerForm (Windows)
< Back
Next >
Finish
Cancel

Use the WinTOTAL 2000 Conversion Wizard to quickly import your files from any of a dozen supported software formats.

File Conversions

- In the *Location of data files to be converted* field, enter the path to the current location of your report files, or click the **Browse** button to navigate to the appropriate folder.
- In the *Location of data files after conversion* field, you can either click the **New** button to create a new folder in your File Cabinet, or click the **Browse** button to find a folder to store them in.

4. Once you have entered the appropriate information, click the **Next** button to progress to the next screen. The information provided in this dialog explains the conversion, and gives some additional information for what to do with your report files after conversion. Once you have read this, click the **Next** button.
5. WinTOTAL will then scan the specified directory for any reports created in the competitor's software and will display a list on the right of files that can be converted. Simply select the file(s) you wish to convert and click the **Add** button. If you want to convert all of the reports at once, click the **Add all** button. The report(s) you select will then appear on the right-hand side of the dialog.

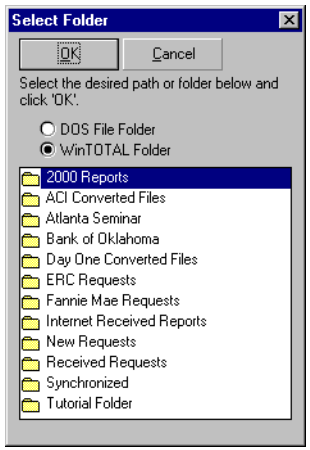
- Select multiple non-contiguous files by holding down the CTRL key while clicking the file names.
- Or, select a block of files by doing the following: Click the first one, then hold down the SHIFT key and click the last one in the list.

6. Once you have selected all of the files you want to convert, click the **Finish** button, and WinTOTAL will convert them automatically and place the new files in the folder you specified as the *Location of data files after conversion*.

Note to users of FormFill's PC Plus software: If you need to convert files from the DOS version of FormFill's PC Plus software, you will need to use the converter that shipped with our DOS TOTAL 2000 package to change them to our DOS format. Follow the instructions in *"Batch conversions from TOTAL 2000 for DOS"* on page 3 to learn how to set up DOS TOTAL 2000. After DOS TOTAL 2000 is installed, go to its Utilities menu and choose "Convert non a la mode...". Once there, press F1 for additional instructions specific to FormFill and PC Plus. Inconsistencies between file versions in PC Plus prevent a reliable conversion; however, we recommend trying the conversion to see if your version is supported.

WinTOTAL Conversion Wizard
WINTOTAL
CONVERSION WIZARD
Enter the required information and click 'Next' to continue. On the next screen, you'll be able to select the report(s) you wish converted.
Location of data files to be converted
Enter the path to the folder containing the data files you wish to convert.
C:\ACI\Data
Browse...
Location of data files after conversion
Enter the path to the folder where the converted data files should be placed.
Converted Files
New
Browse...
< Back
Next >
Finish
Cancel

Simply point the converter to the directory containing your URAR reports and tell it where to put the converted files.



*The **Select Folder** dialog enables you to store your converted data files in any one of your File Cabinet folders for easy reference.*

File Conversions

Upgrading from TOTAL 2000 for DOS

Once again, when upgrading your reports from DOS TOTAL, you have two options. You can either import the files one at a time, or you can use the batch import utility to convert a group of several reports at once.

Batch conversions from TOTAL 2000 for DOS

Just follow these steps for a successful upgrade from TOTAL 2000 for DOS. We've made a program that will convert all user profiles, reports, text databases and comparables database.

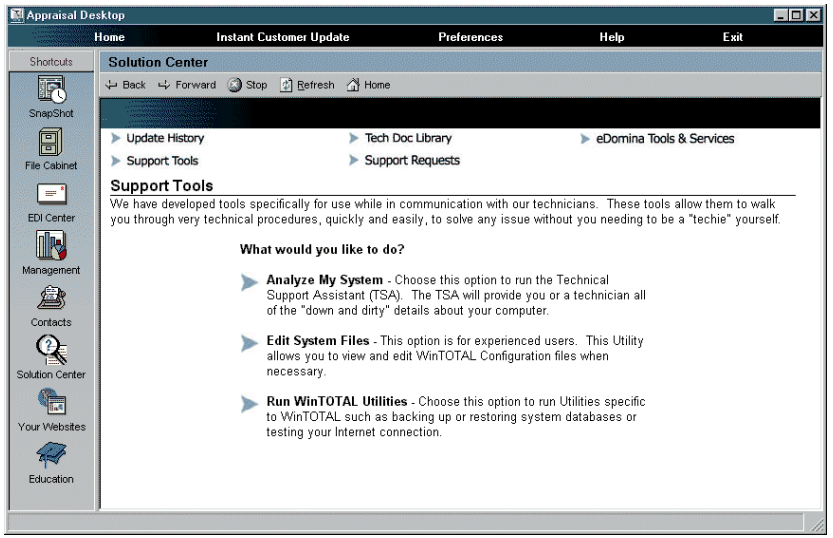
- If you are converting text databases, user configurations, and comps database as well as appraisal reports, you'll need to exit WinTOTAL.
- If you run the files converter more than once on the same set of old files, you'll have multiple copies of them in your WinTOTAL folders. They won't overwrite themselves the second time (on purpose).

1. Start in the Appraisal Desktop. Go to the Solutions Center.
2. Click Run WinTOTAL Utilities.
3. Run the item in the right column titled "Convert from TOTAL 2000 for DOS".
4. Read the instructions on screen and follow the steps in the program to convert your entire DOS TOTAL 2000 system.
5. After you click on any of the buttons, it may ask you to tell it where your TOTAL 2000 for DOS program and/or appraisal files are located. After you've told it once, it shouldn't ask again. For most users, TOTAL 2000 for DOS will be in "C:\TOTAL" and the reports will be in "C:\TOTAL\FILES".

Clean up the old DOS files

When converting files and Text Databases, you have the option of letting the program back up and then delete the old DOS files after it converts them. This is recommended and is set as the default, since the new WinTOTAL files are stored in a compressed format -- they usually take up 90% less room on your hard drive compared to the DOS files. A typical test case converted almost 50 megabytes of TOTAL 2000 for DOS files into just under 3 megabytes of WinTOTAL files.

If you do want the converter to back up and delete your old DOS files to save space, then do nothing (it will already be set that way). If you do not


Appraisal Desktop
Home
Instant Customer Update
Preferences
Help
Exit
Shortcuts
SnapShot
File Cabinet
EDI Center
Management
Contacts
Solution Center
Your Websites
Education
Solution Center
Back
Forward
Stop
Refresh
Home
Update History
Tech Doc Library
eDomina Tools & Services
Support Tools
Support Requests
Support Tools
We have developed tools specifically for use while in communication with our technicians. These tools allow them to walk you through very technical procedures, quickly and easily, to solve any issue without you needing to be a "techie" yourself.
What would you like to do?
Analyze My System - Choose this option to run the Technical Support Assistant (TSA). The TSA will provide you or a technician all of the "down and dirty" details about your computer.
Edit System Files - This option is for experienced users. This Utility allows you to view and edit WinTOTAL Configuration files when necessary.
Run WinTOTAL Utilities - Choose this option to run Utilities specific to WinTOTAL such as backing up or restoring system databases or testing your Internet connection.

The Solutions Center has tools for converting DOS files as well as a lot of utilities to keep you going once you have fully converted to WinTOTAL

want it to back up and delete your Text Databases or appraisal reports after converting them, then click the “Options…” button after choosing either the Step 2 or Step 4 buttons. Simply turn off the backup and delete checkbox and then click OK.

If you do allow it to backup and remove the old files during the conversion, then the old reports, Text Databases, and Quick Lists will not be accessible to DOS TOTAL unless you later use the "Restore backups" button on the screen shown above.

Opening a converted report the first time

When you first attempt to open a converted appraisal report in WinTOTAL, it will take a moment while WinTOTAL does some additional conversion of the actual data files. Once the report has been opened and saved one time, the loading process will be much faster for that report in the future.

Text Database conversions

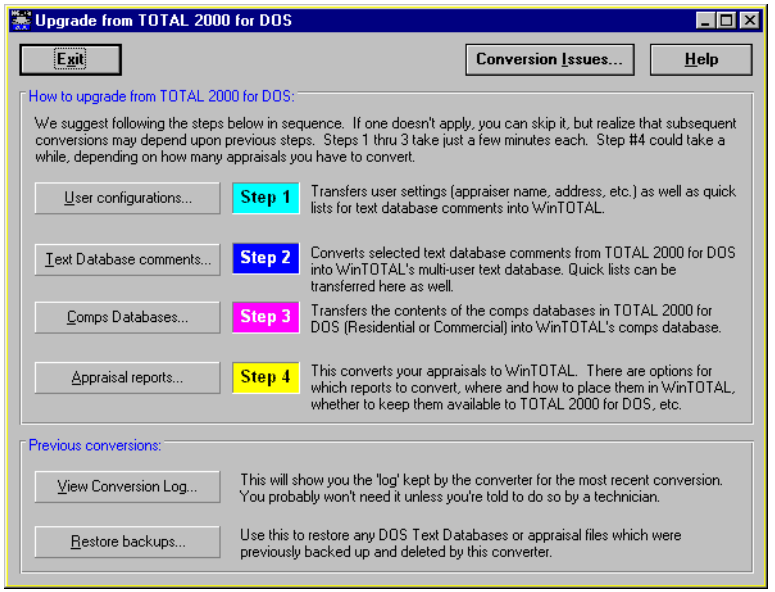
If you convert Text Databases over to WinTOTAL, please be aware that not all comments can be properly converted, since the order of the fields in WinTOTAL's forms is different than in DOS TOTAL's same forms (since the form is no longer broken up screen-by-screen). You may have to re-do a handful of comments, and there's unfortunately nothing the converter can do about it. If you have many multi-field comments, then it's likely that at least some will not convert properly.

Comps Database conversions

Click the Comps Database button to launch the Comps Database converter. If you run the converter more than once on the same database, you'll end up with multiple records for the same properties. They won't overwrite themselves the second time -on purpose. For the database conversion, we recommend doing it only once.

Batch conversions from Grand TOTAL 4.1

If you have TOTAL 4.1 files you'd like to use in WinTOTAL, you must first install TOTAL 2000 for DOS and let its converter update your TOTAL 4.1 files to the TOTAL 2000 format. Then allow WinTOTAL to upgrade your newly converted TOTAL 2000 for DOS files into Windows format.

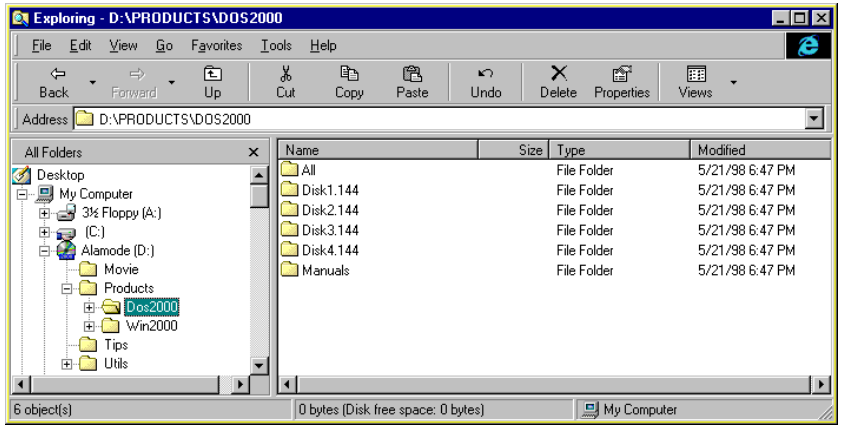

Upgrade from TOTAL 2000 for DOS
Exit
Conversion Issues...
Help
How to upgrade from TOTAL 2000 for DOS:
We suggest following the steps below in sequence. If one doesn't apply, you can skip it, but realize that subsequent conversions may depend upon previous steps. Steps 1 thru 3 take just a few minutes each. Step #4 could take a while, depending on how many appraisals you have to convert.
User configurations...
Step 1
Transfers user settings (appraiser name, address, etc.) as well as quick lists for text database comments into WinTOTAL.
Text Database comments...
Step 2
Converts selected text database comments from TOTAL 2000 for DOS into WinTOTAL's multi-user text database. Quick lists can be transferred here as well.
Comps Databases...
Step 3
Transfers the contents of the comps databases in TOTAL 2000 for DOS (Residential or Commercial) into WinTOTAL's comps database.
Appraisal reports...
Step 4
This converts your appraisals to WinTOTAL. There are options for which reports to convert, where and how to place them in WinTOTAL, whether to keep them available to TOTAL 2000 for DOS, etc.
Previous conversions:
View Conversion Log...
This will show you the 'log' kept by the converter for the most recent conversion. You probably won't need it unless you're told to do so by a technician.
Restore backups...
Use this to restore any DOS Text Databases or appraisal files which were previously backed up and deleted by this converter.

WinTOTAL includes an easy step by step upgrade application to ease your transition into the world of Windows. It imports your report files, user configurations, Text Databases and Comparables Databases. It even “cleans up” the DOS files and conserves room on your disk!

File Conversions

The setup for DOS TOTAL 2000 is located on your WinTOTAL CD. In order for it to be run, it needs to be copied to your hard drive. Follow these steps to copy the setup and run TOTAL for DOS:

1. Go to the Appraisal Desktop's Solutions Center. Then, go to Support Tools.
2. *If you don't know your CD ROM drive letter:* Click on **Edit System Files**, then **Find** and then type **CD** in the dialog that appears and click OK. You'll see a line highlighted that tells you what letter your CD ROM drive is. Note the letter - i.e. "D" "E" or "F", etc. Then click on **Cancel** and then **Exit**.
3. Click **Utilities**. You'll then see an item labeled MS-DOS prompt. Double click it.
4. Make a temporary directory for the setup program.
   Type: **`MD T2DOS`** and press ENTER.
5. Then, switch to that directory.
   Type **`CD T2DOS`** and press ENTER.
6. Now we need to copy the files off the CD. This step assumes your CD is drive E, but if yours is different, just substitute it in the following command:
   Type **`XCOPY E:\PRODUCTS\DOS2000\ALL`** and press ENTER.
7. After the files copy, type **`INSTALL`** and press ENTER to set up TOTAL 2000 for DOS. If you choose the upgrade option when installing, it will prompt you to create Table of Contents files for your old reports - that is what you need to do before proceeding with a batch conversion to WinTOTAL.



The WinTOTAL CD has a full install of our DOS TOTAL 2000 program on it so that you can batch import files from competing systems or upgrade a TOTAL 4.1 file system.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

Pocket TOTAL

Welcome to Pocket TOTAL

Pocket TOTAL is the first appraisal application designed especially for handheld PC's, commonly referred to as HPC's, that run the Windows CE operating system. Incorporating data collection, photos, sketch and more, it further automates the report writing process by eliminating the need to re-type data once you get back to the office. It can save you 30 minutes or more per assignment. Read this document to learn about:

- ***Preparing Your System for Pocket TOTAL***
- ***Installation, Setup and Updates***
- ***Using the Report Manager***
- ***Data Entry on the HPC***
- ***Using Digital Photos***
- ***Sketching the Floorplan***
- ***Reviewing Data Entered in the Field***
- ***Synchronizing with the Desktop***
- ***Internet Sending and Receiving***
- ***Workflow Examples***

Pocket TOTAL is a part of WinTOTAL Enterprise. I Instead of carrying around a cumbersome clipboard in the field, you can enter the information on a handheld PC, like the one shown above, and then have that information transfer straight into WinTOTAL.

For information on purchasing Pocket TOTAL and compatible handheld PC's, contact an a la mode sales representative at 1-800-ALAMODE.

Preparing Your System for Pocket TOTAL

Windows CE services

Before installing Pocket TOTAL, you will need to install the Microsoft Windows CE Services from the CD that came with your HPC. Consult the documentation that came with your handheld computer for information on setting up partnerships between your desktop and HPC. We recommend using the defaults provided by the setup program.

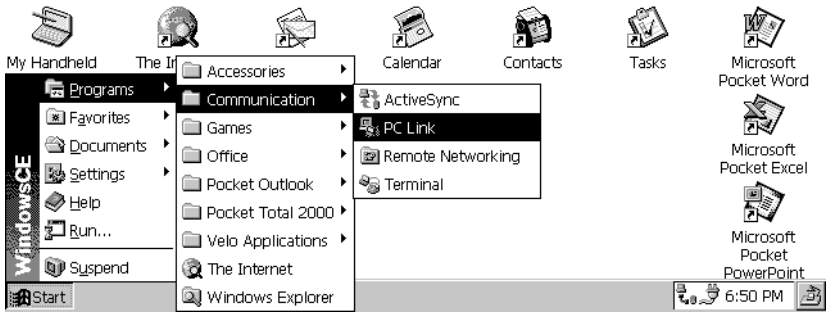
Pocket TOTAL has built-in synchronization services that update the program as well as synchronize report files and requests with WinTOTAL's Office Manager. Therefore, you do not have to activate the ActiveSync services provided by Windows CE that handle things like your address book and appointments in Pocket Outlook, although they are quite handy. All you need is for your PC to recognize when the HPC device is plugged in for Pocket TOTAL's synchronization to work.

If you installed the Windows CE services with the default settings, your PC should automatically recognize when you plug your HPC into your desktop computer.

If your HPC does not automatically connect, here's how to do it manually:

1. On your desktop system, double-click My Computer and then double-click Mobile Devices.
2. Connect your HPC to your computer.
3. If a connection is not established, then on the HPC, tap **Start**, **Programs**, **Communication**, then **PC Link**.
4. After a few moments, your two systems should begin "talking". Depending on your setup, you may be prompted on either your desktop or HPC to confirm the login.

Once again, if you installed the Microsoft Windows CE Services with the default options, this should happen automatically. If you have trouble connecting the HPC to the desktop, you should contact the manufacturer of your particular HPC for additional assistance.



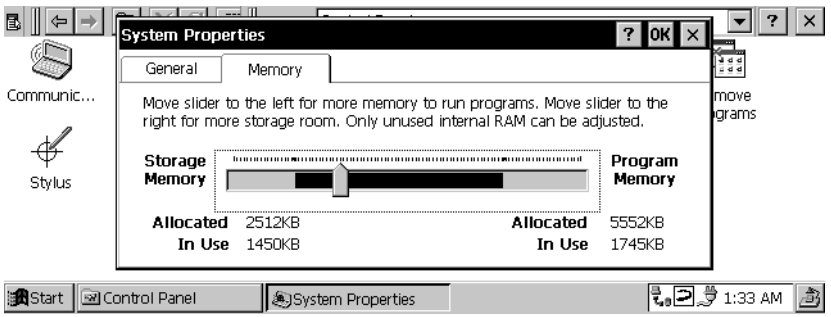
Use the PC Link utility to initiate communications manually if your desktop and hand-held PC's don't start automatically upon connecting.

Configuring memory on the HPC

To effectively use an HPC with Pocket TOTAL, we recommend you have at least 16MB. This memory is used for both permanent storage and RAM. For optimal performance, it is recommended that you use as much of this for RAM as possible. That way, you could run other applications, such as the built-in spreadsheet or web browser at the same time you use Pocket TOTAL.

The setup program for Pocket TOTAL will request up to 2MB (2000KB) of storage space before starting the installation. At a minimum, you should have 2MB of free storage space before setting up Pocket TOTAL. To configure this setting on your HPC, do the following:

1. On your HPC, tap **Start**, then **Settings** and go to the Control Panel.
2. Double-tap the System icon. You will then see your system properties.
3. Tap the **Memory** tab to see how memory is allocated on your HPC.
4. Move the slider to the right to get more Program Memory (RAM) and to the left to get more Storage Memory. Simply make sure the



Your HPC will run faster if you have more of its memory allocated to "Program Memory". But of course, you need room for storing programs and files, too.

difference between the “Allocated” and “In Use” items on the left are more than 2000KB before installing Pocket TOTAL.

5. Tap OK to confirm any changes you may need to make.

You can adjust this setting “on the fly” at any time while using your HPC.

Contrast settings on LCD and monochrome displays

Depending on your handheld device and lighting conditions, you may need to adjust the contrast so that you can see the screen better while in the field. We’ve found that the monochrome devices are easier to see when outdoors. ***As a matter of fact, most color screens are virtually impossible to read in sunlight***. Monochrome screens also boost performance and battery life since they use fewer resources.

Unfortunately, the hardware manufacturers are moving away from monochrome devices; so we recommend getting your hands on one before they are completely discontinued!

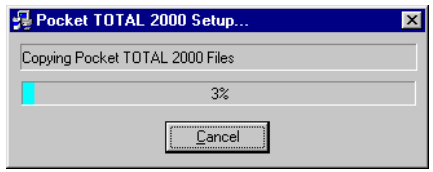
Installation, Setup and Updates

Copying the program to your HPC

Since the Pocket TOTAL setup files are copied to your desktop PC at the time WinTOTAL is installed, there is no need for a separate installation CD. The process by which it gets installed to the HPC is done through WinTOTAL.

1. Press the reset button on your HPC to clear any programs that may currently be running and could interfere with the installation.
2. Connect your HPC to your desktop computer and start the synchronization routines provided by the Microsoft Windows CE Services.
3. Start WinTOTAL and open any report.
4. Click **Tools**, then **Configure**. Then, click the Pocket TOTAL tab.
5. Once on the Pocket TOTAL tab, read it over carefully and click **Install Pocket TOTAL**.
6. It may take several minutes for the program to be copied to your HPC. Follow the instructions as they appear on screen. After Pocket TOTAL is installed, you’ll notice the rest of the options in the Pocket

Depending on the speed of your serial connection, it may take 10 or 15 minutes to install Pocket TOTAL. You will see no activity on your HPC’s screen.



TOTAL section of the Configure dialog are enabled. A Synchronize button will also be available in Office Manager.

Synchronizing your QuickLists

After installing Pocket TOTAL, your QuickLists will automatically transfer to your HPC. Each time you connect your HPC to your desktop PC, additions made to your WinTOTAL QuickLists will be added to your database in Pocket TOTAL. There is no mechanism in Pocket TOTAL to create new QuickList entries, so these must be completed in WinTOTAL.

Getting updates to Pocket TOTAL

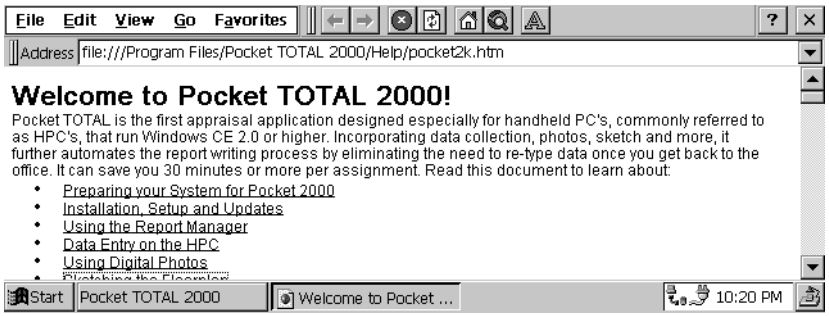
Updates to Pocket TOTAL are delivered right along with your WinTOTAL updates. Just as reports are synchronized, updates shall be synchronized as well upon establishing a connection between your HPC and desktop computer.

*Remember, If your HPC does not connect automatically, you can initiate the link by tapping on the HPC's Start menu, then tapping **Programs**, **Communication** and **PC Link**.*

Starting the program

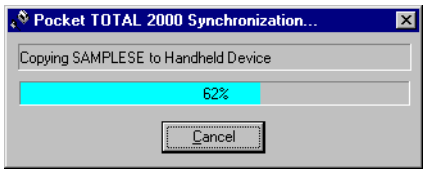
The installation program creates icons for you in your HPC's start menu. To start Pocket TOTAL, simply tap **Start**, **Programs, Pocket TOTAL** and then the icon for **Pocket TOTAL**. Depending on the speed of your HPC, it may take a moment for the program to load. In general, HPC's are not as fast as desktop PC's. Be patient when loading programs - your machine may appear to be "hung" when in reality it is processing information.

By default, the Pocket TOTAL Report Manager will be displayed first. The Report Manager is your virtual file cabinet for your reports.


File Edit View Go Favorites
Address file:///Program Files/Pocket TOTAL 2000/Help/pocket2k.htm
Welcome to Pocket TOTAL 2000!
Pocket TOTAL is the first appraisal application designed especially for handheld PC's, commonly referred to as HPC's, that run Windows CE 2.0 or higher. Incorporating data collection, photos, sketch and more, it further automates the report writing process by eliminating the need to re-type data once you get back to the office. It can save you 30 minutes or more per assignment. Read this document to learn about:
Preparing your System for Pocket 2000
Installation, Setup and Updates
Using the Report Manager
Data Entry on the HPC
Using Digital Photos
Start
Pocket TOTAL 2000
Welcome to Pocket ...
10:20 PM

The Pocket TOTAL user guide is provided in HTML format and viewable on your HPC. When in Pocket TOTAL, just tap Help and Pocket TOTAL...

WinTOTAL has a special function triggered by Windows that synchronizes files between your desktop and HPC even when WinTOTAL isn't running.



Using the Report Manager

Organizing jobs and managing folders

Just as in WinTOTAL, you should create additional folders to store reports and templates. **To create new folders, do the following:**

1. Bring up the Report Manager window. It loads when you first start the program. It can also be accessed while in a report by tapping the **File** menu and choosing **Open**.

2. Tap the **Folders** menu and choose **New**.
3. Type the name of the new folder and tap OK.

There are several other items you can use in the Folders menu to manage your folders. These operations work on the currently selected folder.

- Use the **Rename** option to give a folder a new name.
- The **Delete** function will remove a folder and all of its contents.
- The **Refresh** item is supplied for rare situations when a report may be copied into a folder in a background operation like EDI.

Moving and copying reports

To move or copy a file from one folder to another, do the following:

1. Tap on the file you wish to move or copy.
2. Tap the **File** menu and choose **Move or Copy**.
3. Once the "File Move or Copy" dialog appears, select whether you want to Move the file or Copy it.
4. Then, select the folder from the drop down list.
5. Tap OK.

Note: You can select multiple files for moving or copying or deleting by holding down the CTRL key while tapping on them.

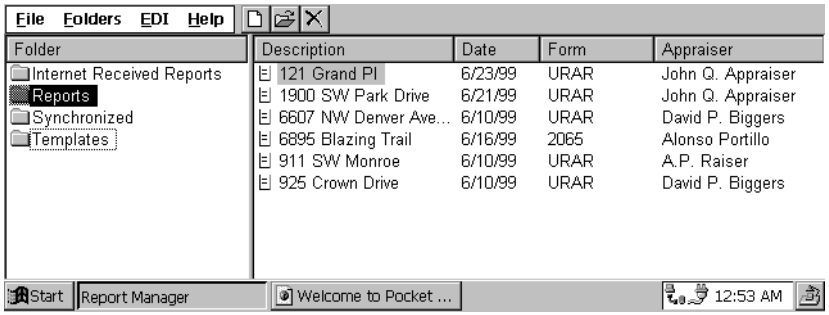
The "Synchronized" folder

When you installed Pocket TOTAL, a Synchronized folder was created in your WinTOTAL File Cabinet and in Pocket TOTAL's Report Manager. Simply move or copy any file you wish to transfer to the other system into the Synchronized folder and it will be transferred next time you connect - even if WinTOTAL isn't running. Please see our section on *"Synchronizing with the Desktop"* for more details.

Creating new files

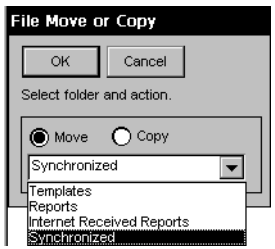
There are several ways to start a new report.

- **Creating new files in Pocket TOTAL.** Once you have started Pocket TOTAL, simply tap **File** and then **New** to start a new request. Or, tap the new document icon in Pocket TOTAL's toolbar. You will



The Report Manager loads as soon as the program is started. It gives you easy access to your files.

Move or copy reports to the Synchronized folder so that they stay in sync with the desktop.

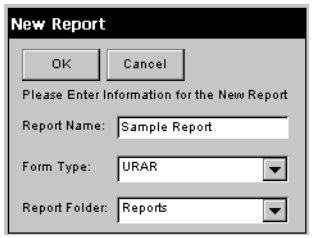


be prompted for the report name, the form type and folder for the report.

- **Copying existing Pocket TOTAL files.** You can copy an existing Pocket TOTAL report by highlighting it and using the Copy command from the Report Manager's File menu. This is handy if you have templates created.
- **Starting files in WinTOTAL 2000.** You can also start a new request using WinTOTAL 2000. Create it just as you would any other request, except when you are done, use the File Cabinet's Move/Copy function to move the file into the Synchronized folder. The next time you connect your HPC to your system, it will be copied to the handheld computer. The information from the Requester will be visible in the Request PowerView of Pocket TOTAL.

WinTOTAL and Pocket TOTAL will always synchronize files that are stored in either system's Synchronized folder. If the file exists on both systems, then the data will be merged according to the chart in *"Synchronizing files"* on page 15.

Pocket TOTAL supports most of the popular major forms. When creating a new report, it defaults to the last type of form you used.



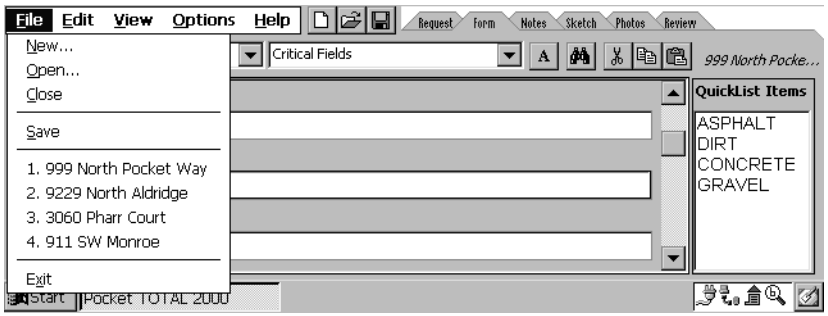
Loading an existing file

1. If the Report Manager is not currently in view, tap **File**, then **Open**.
2. To get to the right folder, simply tap it with the stylus.
3. Double-tap the file you want to load.

Shortcuts in the Report Manager

Here are some shortcuts to make easier work of functions in the Report Manager.

- The File menu contains a Most Recently Used list of the last four files used. This is a quick way to get to a current project.
- To delete a file, tap it once. Then click the "X" button in the toolbar.
- To start a new report, click the new document button in the toolbar.
- If double-tapping is awkward, you can open a report by tapping it once and then tapping the icon resembling an open folder.
- You can select multiple files for moving or copying or deleting by holding down the CTRL key while tapping on them. You can select blocks of files by tapping the first one, then pressing and holding the SHIFT key while tapping the last.



Pocket TOTAL maintains a Most Recently Used file list for easy access straight from the File menu.

Data Entry on the HPC

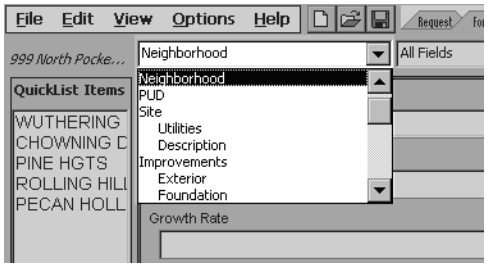
The Pocket TOTAL environment

The Pocket TOTAL data entry environment is segmented into PowerViews. Each PowerView contains functions related to a particular portion of the report. To activate a particular PowerView, just tap once on its name. Certain functions such as: New, Open, Save, Options and Help are available regardless of the currently active PowerView.

Typing into fields

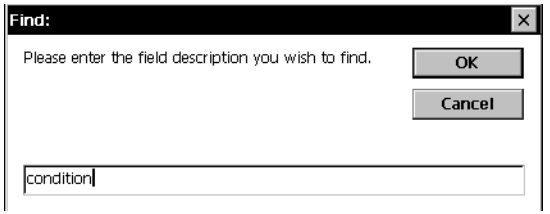
Typing in Pocket TOTAL primarily takes place in the Form PowerView. Instead of emulating the form on the tiny HPC screen, we have arranged the fields linearly in a grid. Above the data entry grid are special controls (in this order): Jump to section, Visible fields list, Font, Find, Cut, Copy and Paste.

- **Use ENTER or TAB to move between fields.** You can also scroll using the scroll bar, arrow keys, and PgUp/PgDn.
- **Jump to sections.** Above the main form is a drop down to take you quickly to sections of the form. This is the fastest way to get around.
- **Visible fields list.** Tap this drop down to filter your list of fields to show "All Fields" available in the form, all "Critical Fields" which you must get while on site or the "Empty Critical Fields" only. *You can even customize the field list to show as many or few items while in the field.* This is described in *"Custom Critical Fields"* on page 8.
- **Screen text size.** Tap the Font button to customize the size of text on screen. The number of fields visible on screen at one time will depend on the size you choose. The smallest size available is 10pt.
- **Quickly find fields**. Tap the binoculars icon and type a field name to quickly jump to it. For example, tap the binoculars once and type the word **bath,** then tap OK. You'll quickly jump to the first field that contains the word **bath** anywhere in its description. Tap the binoculars again, and you'll notice that **bath** is still in there, so just tap OK to find the next instance of the word.
- **QuickList comments.** These work in a manner similar to WinTOTAL. After the program was installed, your comments should've been transferred over automatically. When you get to a



The Jump to Section drop-down is much faster than scrolling through fields to get to a particular section in the form

Use the find button to quickly jump to a field. You don't have to type the entire field name.



field where QuickLists were defined, you'll see them on the right side of the screen. Simply double-tap an entry to use it. The QuickLists may be move to either side of the screen by tapping Options, choosing Configure and selecting Left/Right. There is no functionality for creating comments HPC itself; however, the comments synchronize with your desktop each time you connect.

- **Cut, Copy and Paste.** Buttons for Cut, Copy and Paste are provided in the toolbar above the form entry section to speed your data entry. The Cut tool is handy for clearing an entire field. These items are also in the Edit menu.
- **Checkboxes and picklists.** Data may be entered into checkboxes by simply tapping in the data entry field. For an example of a checkbox field, try the "Predominant Occupancy" fields in the Neighborhood section. Certain fields have predefined picklists, such as the "Marketing Time" field.

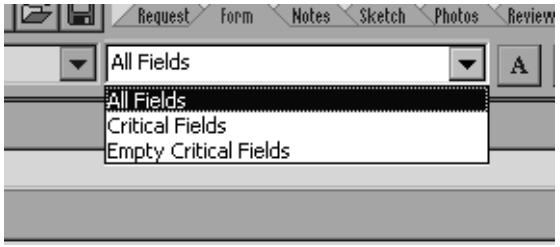
Custom Critical Fields

These are items that most typically need to be gathered/verified while on site. When editing data in the form, you have the option to switch between: All Fields, Critical Fields, and Empty Critical Fields. This feature was designed to keep you from forgetting to note important items and save a return trip back out to the property.

You can customize your list of Critical Fields by doing the following:

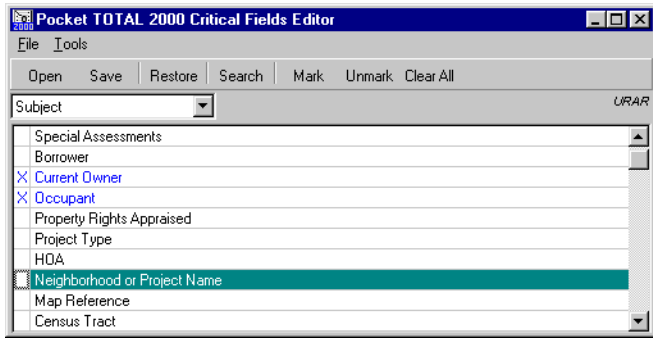
1. Go to the Appraisal Desktop Solutions Center. Then go to Support Tools and select **WinTOTAL Utilities...**
2. Run the item on the right side for the Pocket TOTAL Critical Fields Editor.
3. Click open and choose the Pocket TOTAL form for which you wish to edit the Critical Fields list.

- Move through the fields by scrolling or using the arrow keys.
- You can quickly switch to another section of the form by using the drop-down at the top much like the "Jump to other forms" feature in WinTOTAL.
- Fields can be marked/unmarked by left-clicking the mouse or using the spacebar or ENTER key.



The Critical Fields drop down allows you to only view fields on the form that must be completed on site.

For each form, you can choose which items are displayed in the Pocket TOTAL Critical Fields list.



- Search for fields by clicking the Search button in the toolbar or clicking the Tools menu and selecting Search. Type in part of the description of a field and click OK. To find the next field containing this text, press the F3 key.
- **Restore** will restore the critical fields back to their default settings.

4. When you are satisfied with the list, click the Save button. If you are on a network, each user will have their own settings.

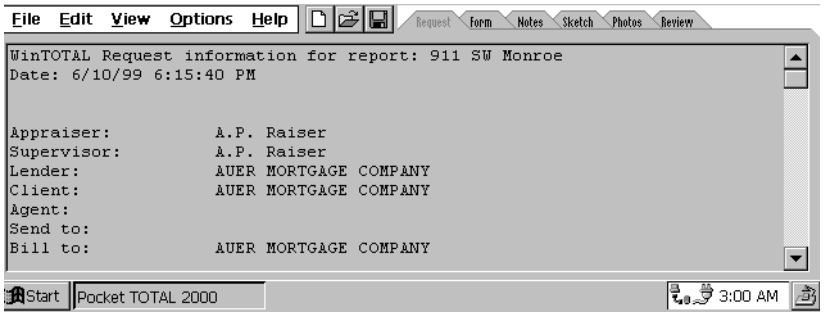
In order for the changes to take effect, you'll need to synchronize your HPC with your WinTOTAL PC. This is described in "Synchronizing with the Desktop" on page 15.

Entering free-form notes

Pocket TOTAL also incorporates a free-form text tool. Simply tap on the Notes PowerView to open a full screen editor where you can enter in comments that will help you when completing the report back at the office.

Using the Request PowerView

For reports that originate in WinTOTAL 2000, you will be able to see all of the information from the original report request in the Request PowerView. This function is not available for reports originating in Pocket TOTAL, even after synchronizing with the desktop.



Use the Request PowerView to view request information on files that originated in WinTOTAL

Using Digital Photos

Overview

Pocket TOTAL has the ability for you to read images from your camera's memory card. This feature is useful in situations where you are out of memory on your card or if remembering which property went with each photo is an issue. In order to use this feature, you must have the following:

1. A digital camera, such as a Kodak DC210, that stores images on removable media.
2. Camera configured to save images in the JPEG format instead of their proprietary format.
3. An HPC with a CF or PCMCIA slot. You may need to purchase an inexpensive adapter for your camera's memory card in case the slot on your HPC is for a different type of media.

Reading images from the memory card

The HPC operating system has a built-in understanding of memory cards. It uses them in much the same way your desktop PC uses floppy disks. As a matter of fact, the same memory cards sold for digital cameras are also sold as external storage for HPC's.

When you switch to the Photos PowerView, the Image Folder label will be displaying the last used image directory.

- On the right side of the screen will be the image files in that directory. If the Image Folder is not correct and/or no image files are in the directory, click Browse and select the correct folder.
- You may find that you need to back up several levels to get to the additional drive representing your memory card.
- Many digital cameras store digital photos in directories on the card. For example, the Kodak digital cameras allow you to create photo albums and subsequently put each photo in the album in a separate directory.

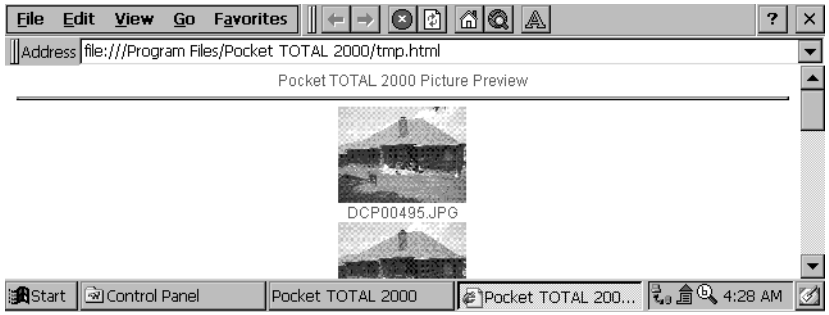
Photos saved on a memory card, such as one from a Kodak DC210, shown here will often be in a subdirectory off the root.

Previewing photos before placing them

The Preview function works by creating a temporary HTML document that Pocket TOTAL launches in the Pocket Explorer web browser.

- You can preview the currently selected image, by tapping **Preview**.
- Or, you can see all photos in the directory by tapping **Preview All**.
- Once a preview is displayed in the web browser, you can tap on it to view it in full resolution.
- Functions in the browser, such as forward and back are available when previewing the images.
- When you are through with previewing the images, exit Pocket Explorer by clicking on the "X" in the top right corner to conserve resources.

It may take a minute or so for each preview to load since HPC's aren't able to create low resolution "thumbnail" images as WinTOTAL does.



Pocket TOTAL employs the Windows CE web browser to display previews of images.

Placing photos in a report

1. Activate the Photos PowerView by tapping it once.
2. Tap the property or view with which the photo should be associated.

3. Verify or Browse to the folder containing the images.
4. Tap once on the name of image file you wish to place.
5. Tap the **Place** button and the photo will be placed in report.

Photos may be removed from a report by tapping once on the description, and then tapping **Remove**.

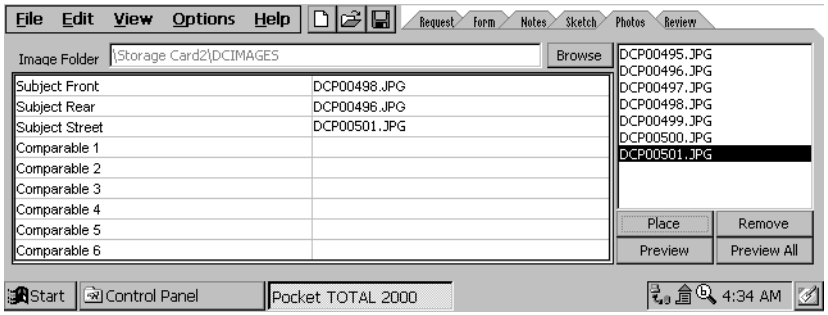
Note: After placing photos in a report, you may wish to delete them from the memory card via Windows Explorer on the HPC.

Digital photos transferred to the desktop

When your Pocket TOTAL file is converted to a WinTOTAL file, any digital photos that were inserted into the Pocket TOTAL report will be placed on appropriate Subject and Comps photo pages automatically. Additionally, the photos will be removed automatically from the file on your HPC to conserve space.

Digital photo storage and performance

To alleviate memory concerns and increase overall performance, consider reducing the "quality" setting on your digital camera. WinTOTAL can do this automatically upon synchronization or reading the image through QuickPix. (See our WinTOTAL chapter on digital photos) However, you can increase the storage on your digital camera by using the middle or lowest quality setting, yet retaining the highest "resolution" setting. The differences in your printed output will be negligible.



Photos placed in a Pocket TOTAL report will automatically be transferred to an appropriate photo page when the file is copied back to the desktop using WinTOTAL's synchronization routines.

Sketching the Floorplan

Sketch PowerView overview

Pocket TOTAL enables you to draw a simple sketch of the floorplan right on your HPC. It's the first on-site, hand-held sketching tool ever introduced in the appraisal industry. We've kept it simple and straight to the point.

Tools for the sketcher are on the left and have the following functions:

When this Line Tool is activated, dimensions will be placed automatically as you sketch.

When this Line Tool is activated, no dimensions will be placed.

Activate the Text tool to place annotations in your floorplan.

This turns the grid on and off. Set the scale by tapping **Options** and then **Sketch settings**.

Use the Undo button to erase lines in the order they were drawn.

When Snap to Grid is activated, your cursor will gravitate toward the nearest grid line on screen.

Click the Zoom-In icon to enlarge the on-screen sketch.

Click the Zoom-out icon to reduce the on-screen sketch and see more on screen.

Tap these icons to switch to one of three pages.

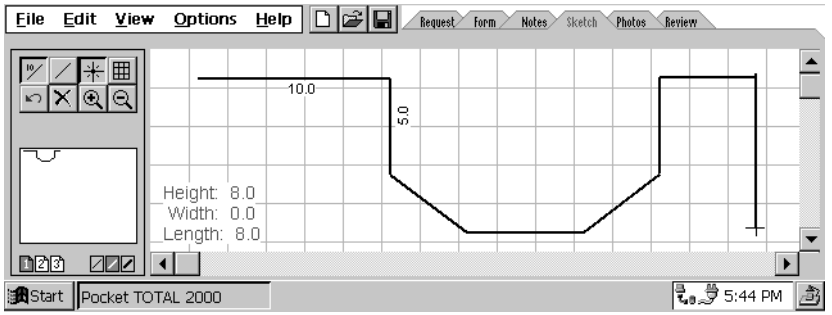
Tap on one of the line widths to set the style of line.

At the bottom of the screen is a thumbnail of the current page.

Draw straight lines by typing dimensions

Although you can tap on the screen and drag your stylus to draw in Pocket TOTAL, you'll be more accurate if you draw with the keyboard.

1. First, activate either one of the Line tools, with or without dimensions.
2. Then, tap the where you wish to start drawing.



Pocket TOTAL includes a simple sketch tool that enables you to get the floorplan right on site. It's a lot easier than carrying around pencils and graph paper!

3. Press ENTER to anchor the cursor and indicate to Pocket TOTAL that you wish to draw a line.
4. Specify the line you want to draw by typing a dimension on the keyboard and pressing the arrow key to denote the direction.
5. Then, press ENTER to actually draw the line.

Draw angles by typing dimensions

Draw angles by specifying the rise and run. For example, to draw a wall that goes down 5 feet and over 6 feet, do the following:

1. If you're not already in the process of drawing lines, activate the line tool, tap where you wish to start drawing and then press ENTER to anchor the cursor.
1. Type 5 and then press the down arrow key.
2. Then, type 6 and press the right arrow key.
3. Complete the line by pressing ENTER.

Moving the cursor without drawing a line

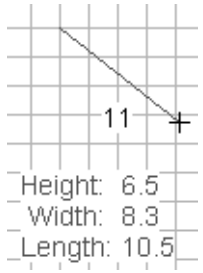
At any point while drawing, press the SPACE BAR to lift your pen off the sketch tablet. At this point, you can type dimensions and directions and press ENTER to move the cursor without drawing a line. Or, you can click in a new location on the page. Then, press SPACE BAR again to put the pen down.

Draw incrementally with arrow keys

You can also draw lines without necessarily typing dimensions.

1. First, tap where you wish to start drawing.
2. Press ENTER to anchor the cursor and indicate to Pocket TOTAL that you wish to draw a line.
3. Press an arrow key in the dimension you wish to draw. You can use all directions. The cursor will move one unit with each key press. Due to limitations in Windows CE, you will need to press the arrow keys repeatedly instead of holding the key down to go multiple units in the same direction.
4. Press ENTER and a line will be drawn between your starting and end points.

As you draw in Pocket TOTAL, you'll notice line dimensions on screen. This is also how you can tell if the pen is up or down.



Placing text annotations in the sketch

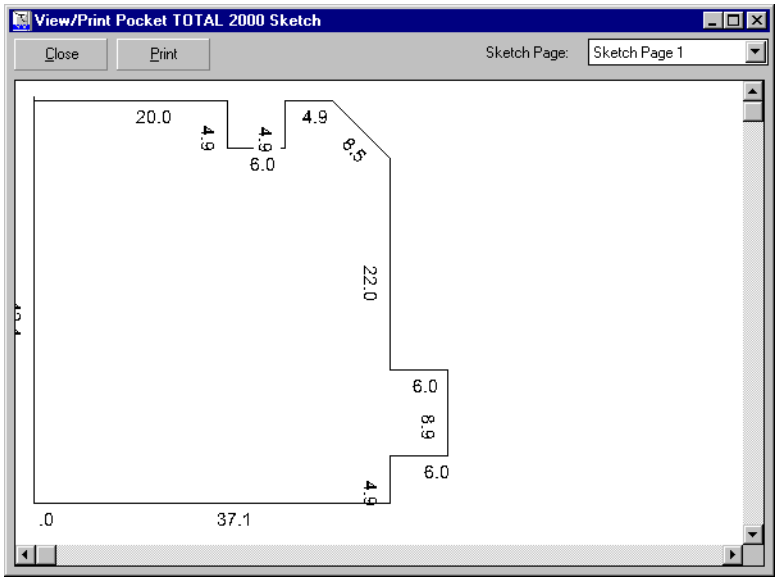
You can use text annotations to denote rooms or other characteristics of the floor plan.

1. Tap the Text tool.
2. Click where you want the text to appear on your sketch.
3. Press the ENTER key to lock down the stylus.
4. Type the text.
5. Press ENTER again to lock it in.

You can repeat steps 2 through 5 to continue placing text on screen.

Sketches converted to WinTOTAL

When files are copied back over to your desktop computer, the Pocket TOTAL sketch is accessible through WinTOTAL's Sketch PowerView. Just click the Pocket Sketch button. From there, you can view and print a hard copy of the sketch so that you may draw a more detailed one using a sketcher integrated with WinTOTAL.



Once your file is synchronized, you can view or print your sketch to make it easier to redraw it in a more powerful desktop sketcher.

Reviewing Data Entered in the Field

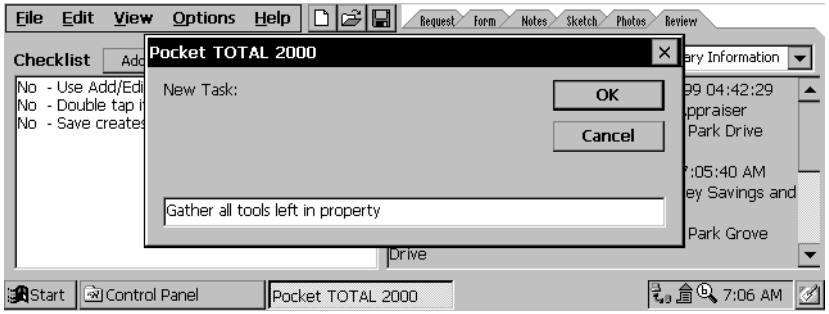
Overview

The Review capabilities in Pocket TOTAL are to ensure you don't have to go back on site once you are through collecting data. Every time you tap the Review PowerView, Pocket TOTAL takes a moment to rebuild the review information. There are two sections in the Pocket TOTAL Review PowerView, the Checklist and Information.

On-site checklist

On the left side is the checklist. Here, you may list items that you want to remind yourself before leaving. We included text for a few items just to explain how it works. You can delete or edit those.

- To add a new task, simply tap **Add**, type your task and tap OK.
- To edit an existing task, tap it, then tap **Edit** and make your changes.
- To remove a task, tap it and then tap **Remove**.
- The **Save** button allows you to save your entries as the default for all future reports.
- The Yes/No item may be toggled by double-tapping on the task.



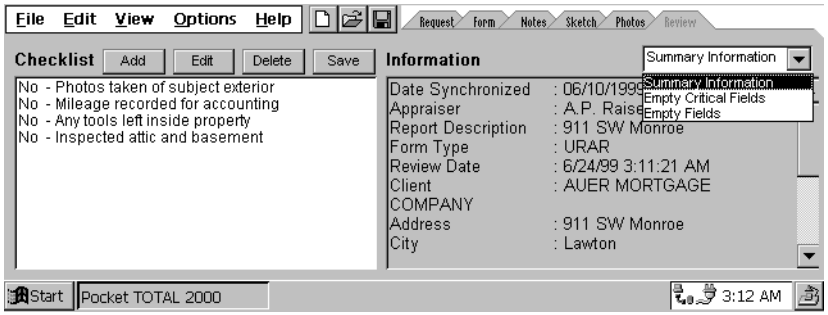
Use Pocket TOTAL's Review PowerView checklist to add your own personal items and important things not to forget before leaving the site.

Report information

The right side of the Review screen lists report information. A drop-down list at the top gives you a view of three different types of information.

- The **Summary Information** displays a variety of items such as the date the report was synchronized and other basic data in the report. At the end of the list, you can see the number of fields in the report, the number of empty fields and the number of empty critical fields.
- The **Empty Critical Fields** actually lists the Critical Fields that have been left empty.
- The **Empty Fields** option will list all fields that contain no data.

Be sure to scroll through the information. There is much more information listed than what will fit on one screen!


File Edit View Options Help
Request Form Notes Sketch Photos Review
Checklist Add Edit Delete Save
Information
Summary Information
Summary Information
Empty Critical Fields
Empty Fields
No - Photos taken of subject exterior
No - Mileage recorded for accounting
No - Any tools left inside property
No - Inspected attic and basement
Date Synchronized : 06/10/1999
Appraiser : A.P. Raiss
Report Description : 911 SW Monroe
Form Type : URAR
Review Date : 6/24/99 3:11:21 AM
Client : AUER MORTGAGE
COMPANY
Address : 911 SW Monroe
City : Lawton
Start
Pocket TOTAL 2000
3:12 AM

The Review PowerView is where you can see a summary of your entries as well as get quick information regarding empty fields in the form. Use the checklist to make sure you don't leave the site without performing crucial tasks that could cause a return

Synchronizing with the Desktop

Synchronizing QuickLists

Any new QuickList items that have been added to WinTOTAL since the last time you connected will be transferred to your HPC automatically. There is no function for creating new QuickList comments in the field on the HPC.

Synchronizing files

Before connecting your HPC back to your computer, make sure the file is moved to your "Synchronized" folder on the HPC. Simply tap **File** and select the **Move/Copy** function. When your HPC is connected to your PC, it will automatically be sync'd with your Office Manager.

You should only keep currently active jobs in your Synchronized folders. Once you are past the point where an assignment needs to be synchronized, you should move it to a permanent location on both systems.

Due to storage limitations on the HPC, we don't recommend transferring all your reports to the HPC. However, the Pocket TOTAL files are small in size, so feel free to keep any file on there that you may want to use later as a template for another report.

Synchronization logic when file exists on both systems

Edited in Pocket TOTAL since last sync'd	Edited on desk-top since last sync'd	Result
Yes	Yes	Data from both files is merged together. Blank fields are skipped
Yes	No	Pocket TOTAL data, includ-ing blank fields, is copied over data in WinTOTAL file.
No	Yes	Desktop data, including blank fields, is copied over data on HPC.
No	No	No data exchanged.

Images embedded in Pocket TOTAL files

When images are used in a Pocket TOTAL report, they will only be synchronized one time - inserted into appropriate photo pages in the report. Additionally, the images on the handheld PC will take precedence over any images already in the report. After the file is copied to your desktop system, the images are removed from the file on the HPC.

Synchronization options in WinTOTAL

To configure your synchronization options, do the following:

1. Open a report in WinTOTAL.
2. Click **Options**, then **Configure** and then the Pocket TOTAL tab.
3. The Synchronization options are in the lower half of the screen.

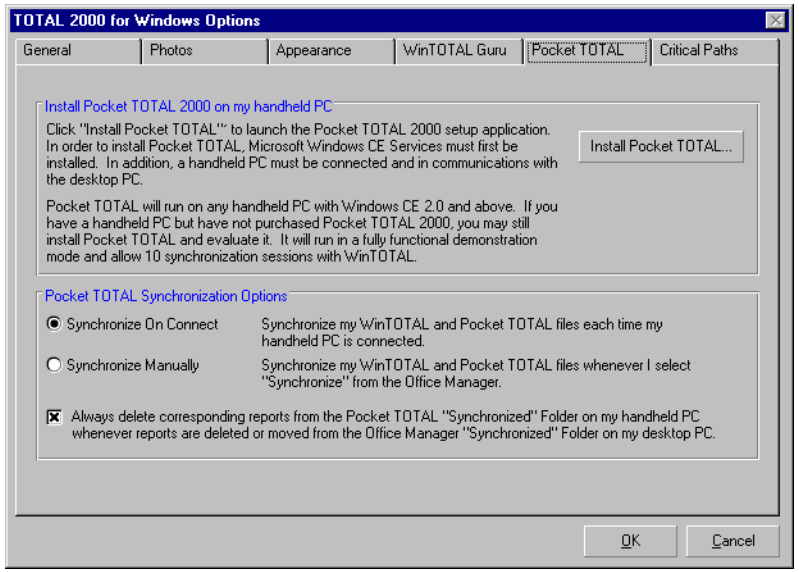
- "Synchronize On Connect" is the default option. It causes your desktop and HPC to synchronize files each time you connect, regardless of whether WinTOTAL is running or not.
- "Synchronize Manually" suppresses synchronization until you click the Synchronize button in Office Manager.
- The option to "Always delete corresponding reports from the Pocket TOTAL Synchronized folder..." is useful because it keeps you from having to repeat the process of moving files out of the Synchronization folders on both the HPC and WinTOTAL. You wouldn't want to keep "finished" files in the Synchronized folders because they will perpetually be synchronizing! Use this option if you rarely have to re-edit a file on the HPC after it is merged with the desktop.

4. Click OK after you have selected the desired options.

Manual synchronization

Synchronization routines may also be initiated manually from your desktop. Be sure your HPC is connected at the time you run them.

- To manually synchronize files and QuickLists, open WinTOTAL's Office Manager and click **Synchronize**.
- To manually rebuild the QuickLists on your HPC, open WinTOTAL's Technical Support Assistant, click **Utilities** and then run the option from the list on screen.


TOTAL 2000 for Windows Options
General
Photos
Appearance
WinTOTAL Guru
Pocket TOTAL
Critical Paths
Install Pocket TOTAL 2000 on my handheld PC
Click "Install Pocket TOTAL" to launch the Pocket TOTAL 2000 setup application. In order to install Pocket TOTAL, Microsoft Windows CE Services must first be installed. In addition, a handheld PC must be connected and in communications with the desktop PC.
Install Pocket TOTAL...
Pocket TOTAL will run on any handheld PC with Windows CE 2.0 and above. If you have a handheld PC but have not purchased Pocket TOTAL 2000, you may still install Pocket TOTAL and evaluate it. It will run in a fully functional demonstration mode and allow 10 synchronization sessions with WinTOTAL.
Pocket TOTAL Synchronization Options
Synchronize On Connect
Synchronize my WinTOTAL and Pocket TOTAL files each time my handheld PC is connected.
Synchronize Manually
Synchronize my WinTOTAL and Pocket TOTAL files whenever I select "Synchronize" from the Office Manager.
Always delete corresponding reports from the Pocket TOTAL "Synchronized" Folder on my handheld PC whenever reports are deleted or moved from the Office Manager "Synchronized" Folder on my desktop PC.
OK
Cancel

In WinTOTAL, click Options, Configure and then the Pocket TOTAL tab to adjust your synchronization options.

Internet Sending and Receiving

Overview

Pocket TOTAL has the ability to communicate with WinTOTAL via Internet e-mail as well. That way, you can send and receive requests and data while you are out of the office. Pocket TOTAL is assisted by the Internet connectivity and Pocket Outlook modules bundled with the Windows CE operating system.

Configuring these modules is done outside of Pocket TOTAL and something Pocket TOTAL assumes is already complete by the time you attempt to use the features. It is likely that there are different options for the varying models of HPC's, but we will attempt to give you the general idea here to assist you in setting up Internet e-mail on your HPC.

If you use an HPC with wireless capabilities, please skip these sections on HPC communications properties and Internet settings. Instead, refer to the manual that came with your wireless HPC.

HPC communications properties

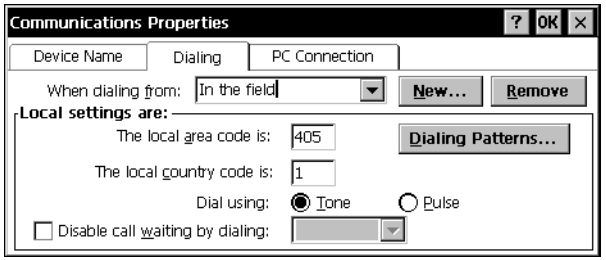
By definition, the HPC is a mobile device that is used often "on the road" by people that travel frequently. Therefore, it has special settings that allow you to set up profiles for dialing from different area codes or countries. Here is one way to set it up to dial from the field when in the same area code.

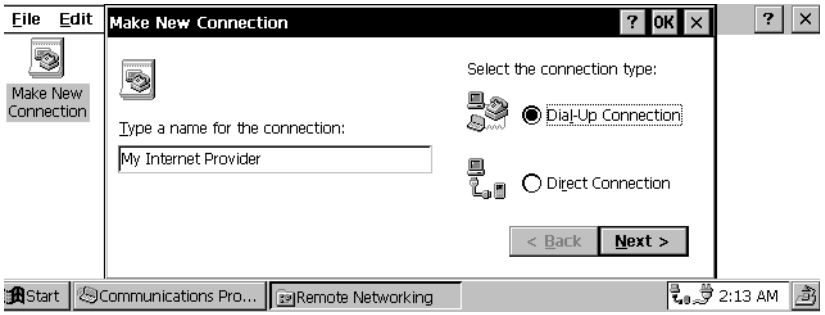
1. Tap **Start** and then **Settings**, and then **Control Panel.**
2. The next step varies with the version of CE your system runs:

- On CE 2.0 HPC's, such as the Novatel CONTACT, double-tap the Communications icon. Then, tap the **Dialing** tab to bring it into view.
- On CE 2.1HPC's, usually with color screens, tap the Dialing icon.

3. Let's set up a new "profile" for in the field. Tap **New** and type **In the Field** for the new location. Then, tap OK.
4. Type your local area code, a country code of **1**, tone or pulse and appropriate options for call waiting.
5. Tap **Dialing Patterns**. This is where you tell it if you have to dial a country code or area code from this location. All three items should typically have a **G** in them. Tap OK.

HPC's contain dialing properties to accommodate different options when connecting with your modem.





Creating a new dial-up connection on an HPC is similar to creating one on your desktop PC. Consult your ISP if you need assistance beyond this document.

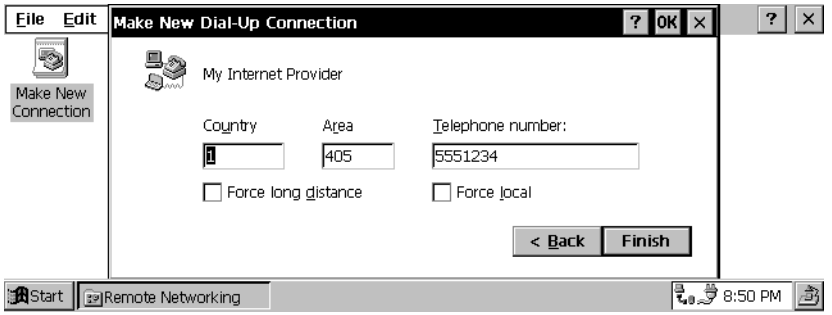
6. Now, tap OK again to accept the Communications Properties.

Configuring HPC Internet settings

This section will help you connect your HPC to the Internet. It is similar to connecting with your desktop PC and likely that you will be able to use your existing ISP with your HPC. For this section, you will need to know the number for your ISP's dial-up, your account name and password.

1. Tap **Start, Programs, Communication**, then **Remote Networking**.
2. Double-tap on **Make New Connection**.
3. Type a name for the connection. For example, the name of your ISP.
4. Select the item that says **"Dial-Up Connection"** since we will be dialing the Internet. Then, click Next.
5. Verify the modem selected. You typically will have only one on your HPC. The default modem strings and TCP/IP settings should work for most ISP's. If you have problems connecting, you should consult the documentation that came when you ordered your Internet service or call the support department of your Internet provider.
6. Click **Next** and you will see a screen where you enter the telephone number of your ISP. Enter a **1** for the country code, your appropriate area code and the telephone number of your ISP.
7. Click **Finish** and you will be returned to the Network Settings screen.
8. If your HPC is connected to your desktop computer at this time, you will need to disconnect. Then, test the Internet connection by double-tapping on the connection.
9. Enter your user name and password. A Domain is typically not required. Tap **Save password** if you do not wish to type this information again when you connect.
10. Make sure a phone line is connected to your HPC and tap Connect.
11. Once connected, you should be able to browse the Internet. Just tap the Internet icon on your desktop. Or tap **Start**, **Programs** and then **The Internet**. Try hitting a site such as a la mode's home page by typing **http://www.alamode.com** in the URL field.

If you experience trouble connecting to the Internet with your HPC, you should consult the Windows CE reference guide as well as contact your ISP for additional assistance.



If you use a standard modem connection, you should be able to dial your ISP with the same number for both your PC and handheld. But, you probably won't be able to connect them both at the same time.

Configuring Pocket Outlook

Once you have successfully connected to the Internet and verified that you can visit various web sites, you'll need to set up e-mail services in Pocket Outlook.

When using Pocket TOTAL with the Internet, you'll need to have an e-mail address separate from your personal e-mail as well as your regular WinTOTAL e-mail - *in other words, a third e-mail account.* Customers that purchase Pocket TOTAL are able to have another e-mail account on our Project 2000 server. Contact our Technical Support department to set up an additional account.

Once you have an account name and a password, here is how you configure Pocket Outlook to use it. These steps recommend different options than those you would use for a regular e-mail account on your HPC, so it is important that you follow them.

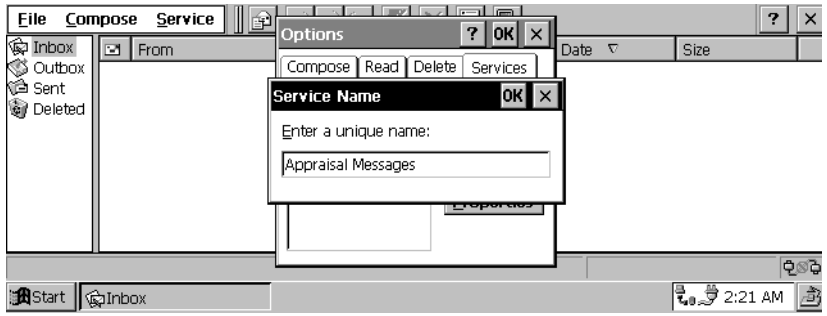
1. Start Inbox using the shortcut on your HPC desktop or hot-key often found on HPC's. Or, go the long way by tapping **Start**, **Programs**, **Pocket Outlook** and then **Inbox**.
2. The next step varies, depending on the version of CE your HPC has:

- On systems running CE 2.0, tap **Compose** and then **Options**.
- On systems running CE 2.1, usually those that have color screens, tap **Services** and then **Options**.

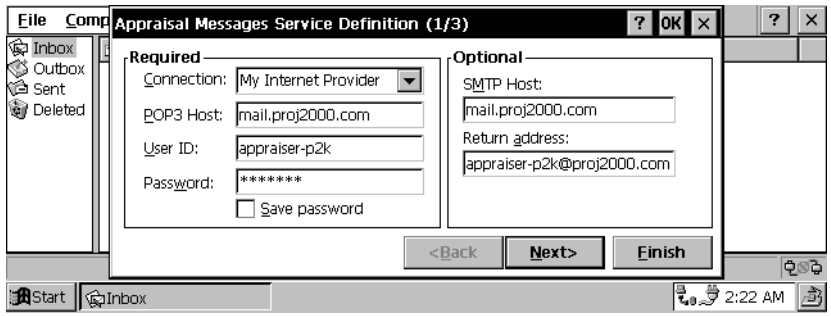
3. We recommend leaving the **Compose**, **Read** and **Delete** options at their default. Tap the **Services** tab.
4. Tap **Add** to set up a new e-mail account.
5. The next step varies depending on the version of CE your HPC has:

- On HPC's running CE 2.0, select **Internet Mail**, tap OK and enter a unique name for the service. You may want to call it **Appraisal Mail**.
- On HPC's running CE 2.1, select **POP3** and enter a unique name for the service. You may want to call it **Appraisal Mail**.

6. Next, you need to specify the connection settings. Select the appropriate Internet connection, as described in *"Configuring HPC Internet settings"* on page 18.
7. For the POP3 Host, use **mail.proj2000.com.**



Pocket TOTAL uses the Pocket Outlook program bundled with the CE operating system. Since you should keep appraisal e-mail separate from the personal e-mail you may receive on the HPC, you should create a separate Service for it.



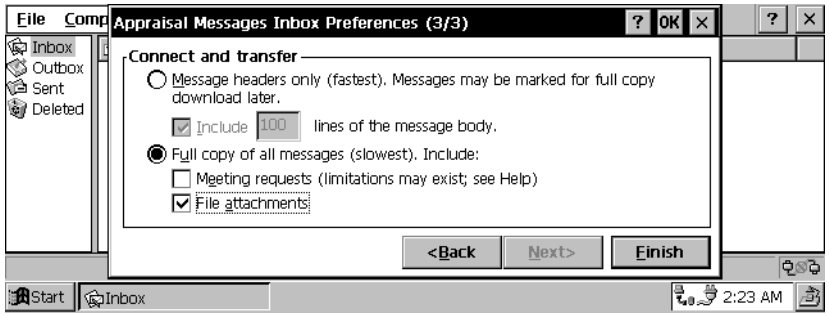
You should use a separate mailbox for Pocket TOTAL reports. Contact our support department on setting up an additional account under your a la mode customer number.

8. For the User ID, enter the account name that was given to you at the time you requested your Pocket TOTAL mail account. It will most likely be based on your customer number with extra letters at the end denoting it is for Pocket TOTAL.
9. Enter the password you specified when requesting the account.
10. Specify an SMTP host of **mail.proj2000.com**.
11. Specify a return address of your account name followed by "@proj2000.com".
12. Tap **Next**. At this point, you may want to check the box that disconnects you after actions are performed. This is at your discretion as are the other options on this screen.
13. Tap **Next**. *This screen is very important! Due to storage and speed limitations, Pocket Outlook does not default to downloading entire e-mail messages. For Pocket TOTAL EDI to work correctly, you must change the default settings on this screen.*

- Select the option for **Full copy of all messages**
- Check the box for **File attachments** as well.

14. Tap **Finish** and then OK.

These settings only affect messages for your Pocket TOTAL mailbox. If you have other e-mail services on your HPC, they will use their own individual settings.



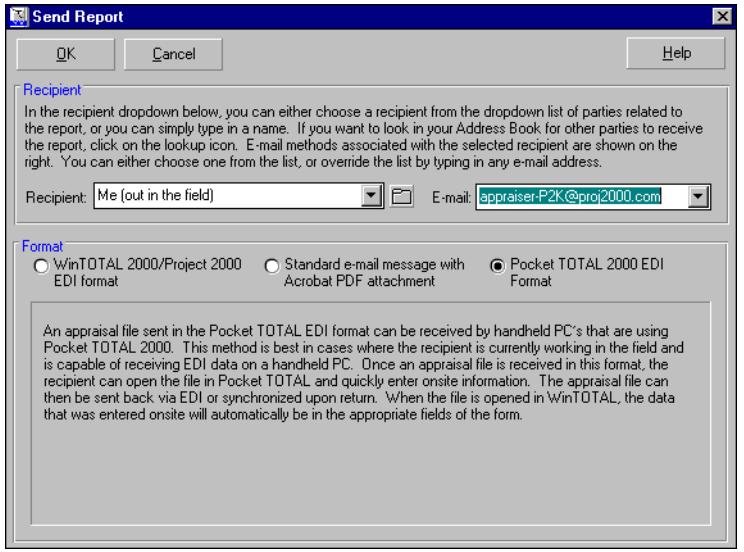
It is important that you mark the option to download full messages with attachments so that Pocket TOTAL reports transmit properly.

Sending from WinTOTAL to Pocket TOTAL

When reports are sent from WinTOTAL to Pocket TOTAL, the outbound report is automatically converted to the Pocket TOTAL format. Only data from the Requester and major form are sent.

In WinTOTAL, do the following:

1. Start in WinTOTAL's Office Manager.
2. Click once on the report you wish to send.
3. Click the **EDI** menu and choose **Send Report via Internet EDI**.
4. When our EDI Wizard appears, enter the recipient's name and e-mail address and choose the Pocket TOTAL method of sending.
5. Click OK.


Send Report
OK
Cancel
Help
Recipient
In the recipient dropdown below, you can either choose a recipient from the dropdown list of parties related to the report, or you can simply type in a name. If you want to look in your Address Book for other parties to receive the report, click on the lookup icon. E-mail methods associated with the selected recipient are shown on the right. You can either choose one from the list, or override the list by typing in any e-mail address.
Recipient:
Me (out in the field)
E-mail:
appraiser-P2K@proj2000.com
Format
WinTOTAL 2000/Project 2000 EDI format
Standard e-mail message with Acrobat PDF attachment
Pocket TOTAL 2000 EDI Format
An appraisal file sent in the Pocket TOTAL EDI format can be received by handheld PC's that are using Pocket TOTAL 2000. This method is best in cases where the recipient is currently working in the field and is capable of receiving EDI data on a handheld PC. Once an appraisal file is received in this format, the recipient can open the file in Pocket TOTAL and quickly enter onsite information. The appraisal file can then be sent back via EDI or synchronized upon return. When the file is opened in WinTOTAL, the data that was entered onsite will automatically be in the appropriate fields of the form.

Be sure to choose the Pocket TOTAL format when sending a file to your HPC so that it gets converted to a format that your HPC can read once it is received.

6. Once back in Office Manager, click the **EDI** menu select **Send/ Receive all Internet EDI**.

For more information on transmitting files through the Internet with WinTOTAL and automating the connection/delivery process, see our WinTOTAL user guide, or click Help while in the EDI Wizard.

To retrieve the file on your HPC:

The process for receiving files in Pocket TOTAL involves using Pocket Outlook to download the files and then using Pocket TOTAL's EDI functions to move them from the Inbox to the Internet Received Reports folder.

1. Make sure you are connected to a phone line or that your HPC is otherwise ready to connect to the Internet.
2. Open Pocket Outlook's Inbox on your HPC.
3. Tap **Service** and verify that the account set up for your appraisal e-mail is selected. Then, tap **Service** again and select **Connect**. This will retrieve (and send) all mail for the selected account. You may have to enter your user name and password to get on the Internet.
4. Once the mail is retrieved, open Pocket TOTAL's Report Manager.
5. Tap **EDI** and select **Receive Internet EDI**.
6. Any Pocket TOTAL messages that were in your "Appraisal Messages" Inbox will be moved to your Internet Received Reports folder.

At this point, you may wish to move them to a working folder, or even your Synchronized folder.

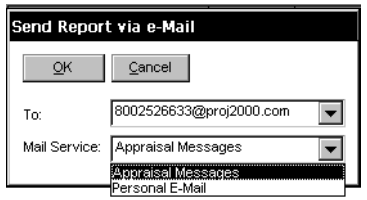
Sending from Pocket TOTAL to WinTOTAL

The process for sending files from Pocket TOTAL involves using our Report Manager to place files in Pocket Outlook's "Outbox", then using the connection features in Pocket Outlook to actually deliver them to their intended destination.

To send the file from the HPC:

1. In Pocket TOTAL's Report Manager, tap once on the report you wish to send. (Tapping twice opens it and we don't want that!)
2. Tap **EDI** and select **Send via Internet EDI**.

When sending from Pocket TOTAL, be sure to select the service that was set up in Pocket Outlook for your Pocket TOTAL files.



3. Type the e-mail address of the intended recipient. This should be a mailbox intended for WinTOTAL reports only since the message will be unreadable except by WinTOTAL.
4. Select the mail service you set up in Pocket Outlook for appraisal related mail. Then, tap OK.
5. Open Pocket Outlook's Inbox on your HPC.
6. Tap **Service** and verify that the account set up for your appraisal e-mail is selected.
7. Then, tap **Service** again and select **Connect**. This will retrieve (and send) all mail for the selected account. You may have to enter your user name and password to get on the Internet.

You can send multiple files at one time through Pocket TOTAL. They simply get put in the Outbox awaiting the next connection to the Internet.

To retrieve the file(s) in WinTOTAL:

This is just like retrieving any other files sent through the Internet to WinTOTAL.

1. Click the **EDI** menu.
2. Select **Send/Receive all Internet EDI**.
3. The report you sent from the HPC will "land" in your Internet Received Reports folder.

For more information on using the Internet with WinTOTAL and automating the connection/delivery process, see our WinTOTAL user guide.

Workflow Examples

Starting in WinTOTAL and connecting with a cable

1. Create the new request in WinTOTAL as you typically would.
2. **Move** it to WinTOTAL's Synchronized folder.
3. Connect the HPC and allow the report to copy to the HPC's Synchronized folder.
4. Go into the field and work up the report.
5. Back at the office connect the HPC to your desktop machine and allow the report to synchronize back to the desktop.

Use the Move/Copy function in WinTOTAL's Office Manager to move files and from the Synchronized folder. Remember to select the option to move the file, since Copy is the defa

6. **Move** the report out of WinTOTAL's Office Manager Synchronized folder to a more appropriate working folder.
7. If you are done on the HPC, **move** the report out of the HPC's Synchronized folder or delete it. See *"Synchronization options in WinTOTAL"* on page 16 to learn how to automate this procedure.

Starting in Pocket TOTAL connecting with a cable

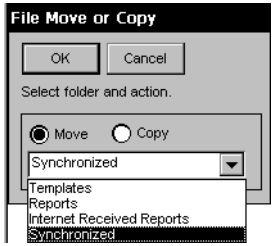
1. Start and enter data into a Pocket TOTAL file.
2. **Move** the file to the Synchronized folder if it is not already in there.
3. Connect the HPC to the desktop and allow the file to be copied over.
4. **Move** the file out of WinTOTAL's Synchronized folder into a more appropriate working folder and complete the report.
5. If you are done on the HPC, **move** the report out of the HPC's Synchronized folder or delete it. See *"Synchronization options in WinTOTAL"* on page 16 to learn how to automate this procedure

Starting in WinTOTAL and connecting via EDI

1. Create the new request in WinTOTAL as you typically would.
2. Use WinTOTAL's EDI functions to send it to the HPC's mailbox.
3. Retrieve the report on the HPC and work it up in Pocket TOTAL.
4. You now have two options to get the file back to the desktop:

- **Send the file back to the WinTOTAL e-mail address and retrieve it in WinTOTAL.** This method does not allow you to synchronize with any files in WinTOTAL. However, you can merge information from the Pocket TOTAL file by loading the report that you want to merge into and using the Merge data function in WinTOTAL's Form menu.
- **Using the standard cable/PC Link.** Move the Pocket TOTAL report into the Synchronized folder as well as the WinTOTAL file into its Synchronized folder so they will synchronize when you connect via a cable back at the office. After synchronizing, you should move the file from each system's "Synchronized" folder. See *"Synchronization options in WinTOTAL"* on page 16 to learn how to automate this procedure.

Be sure to move requests sent from WinTOTAL 2000 into the Pocket TOTAL Synchronized folder if you are going to transfer them to the desktop via the PC Link/ cable connection.



Starting in Pocket TOTAL and connecting via EDI

1. Create the new request in Pocket TOTAL as you typically would and work up the report.
2. Send the file using Pocket TOTAL's EDI functions.
3. You now have two options to get the file back to the desktop:

- **Send the file back to the WinTOTAL e-mail address and retrieve it in WinTOTAL.** You can then merge information from the Pocket TOTAL file by loading the report that you want to merge into and using the "Merge data..." function in WinTOTAL's Form menu.
- **Using the standard cable/PC Link.** Move the Pocket TOTAL report into the Synchronized folder. Then connect. After synchronizing, you should move the file from each system's "Synchronized" folder. See *"Synchronization options in WinTOTAL"* on page 16 to learn how to automate this procedure.

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

Digital Workfile

USPAP Compliance in the Digital Domain

Get rid of file cabinets

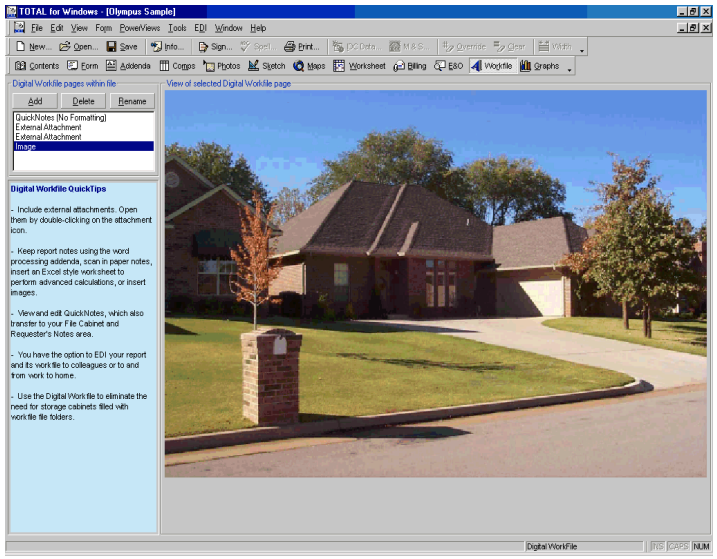
The Digital Workfile is designed to eliminate all the paper associated with USPAP's guidelines for storing your workfile. Items you save in the digital workfile stay on your system and don't EDI or print with the rest of your report unless you specifically send them. We hope that less paper for you translates into hard dollar savings on not only supplies, but for the space used for the paper.

WinTOTAL's file format provides further enhancements

WinTOTAL's file format (*.ZAP) was initially designed to incorporate multiple documents in one file. The power of this design decision now manifests itself in the Digital Workfile. Not only does WinTOTAL's architecture lend itself to letting you put anything a report, WinTOTAL also compresses whatever files are included to conserve disk space and reduce the amount of time it takes to transfer files online.

Use the Vault for a USPAP compliant backup

The Digital Workfile is the perfect accessory to maximize the usage of the eDomina Vault. The Vault is an online storage facility custom tailored to appraisers. For pennies per file, you can have a secure and confidential copy of your appraisal stored offsite - away from system crashes and natural disasters. The Vault also has automation way beyond conventional backup systems so you can't "forget" to do the backup. **For more information, visit our online services site, www.edomina.com**.


TOTAL for Windows - [Olympus Sample]
File Edit View Form PowerViews Tools EDI Window Help
Contents Form Addenda Comps Photos Sketch Maps Worksheet Billing ESO Workfile Graphs
Digital Workfile pages within file
View of selected Digital Workfile page
Add
Delete
Rename
QuickNotes (No Formatting)
External Attachment
External Attachment
Image
Digital Workfile QuickTips
- Include external attachments. Open them by double-clicking on the attachment icon.
- Keep report notes using the word processing addenda, scan in paper notes, insert an Excel style worksheet to perform advanced calculations, or insert images.
- View and edit QuickNotes, which also transfer to your File Cabinet and Requester's Notes area.
- You have the option to EDI your report and its workfile to colleagues or to and from work to home.
- Use the Digital Workfile to eliminate the need for storage cabinets filled with workfile file folders.
Digital WorkFile
NUM

You can store most anything you need to save, but not display in your report to the Digital Workfile. Work orders, notes, addenda, even extra images like this!

Using the Digital Workfile

Adding documents into your file

The Digital Workfile can hold practically anything you put into it. We've even included items native to WinTOTAL so that you can work on them right inside the report.

1. Click Add.
2. Select the type of attachment from the drop-down list. Depending on the type of attachment, there may be other options. They are described in the next section.

3. Enter a description for this article. This is for your own internal use. You can rename an item after it's in your Digital Workfile by highlighting it and clicking Rename.
4. Click OK.

This section will discuss specifics for each type of file you may add.

Digital Workfile Addenda

This is the same interface used for entering in overflow addenda in your reports.

Digital Workfile Image

This can be an image from your digital camera or any other source or from the Windows clipboard.

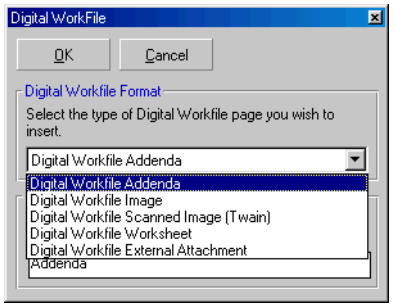
- For images that are already saved in file, choose Disk file or CD-ROM. Once you click OK, you'll have a dialog where you can browse your directories for images and even see a preview.
- If the program you're using doesn't support saving to an external file, see if that program will copy its image to the Windows clipboard - usually the Copy command in the Edit menu. You can also use the Print Screen key and ALT+ Print Screen to capture a screen shot of your system or active window respectively.

Digital Workfile Scanned Image (TWAIN)

Flatbed scanners are becoming more and more popular as prices drop and appraisers are seeing the value in being able to scan things into our Scanned Addendum forms. The Digital Workfile enables you to scan straight into it as well. See our Photos chapter for details on how to use a scanner with WinTOTAL.

Digital Workfile Worksheet

A worksheet is like a very powerful calculator. You set up equations with variables in a "model" and then can view different scenarios by changing the variables. WinTOTAL provides the Worksheet PowerView for you to create your own calculations and models to override the form. The Digital Workfile provides you additional worksheets where you can permanently store any ad hoc equations you did to arrive at your value conclusion.



The Digital WorrkFile enables you to insert practically anything inside your electronic file, so you no longer need to keep paper copies.

Digital Workfile

Digital Workfile External Attachment

Last, but not least, you can always just embed a file created in another program into the digital workfile. This could be a PDF of the original order, a web page that had information on it or a data file from another program you may use. It doesn't matter. If it is able to be stored on your PC, you can insert it into the Digital Workfile and have it saved forever with the appraisal report.

Digital Workfile functions

As mentioned before, the Digital Workfile does not print with your report and does not EDI with the rest of your report.

- The Digital Workfile can only be sent EDI when you use WinTOTAL's native EDI format. After clicking the EDI menu and choosing "Send report via Internet EDI", be sure to choose the WinTOTAL format and clear the checkmark that tells our EDI module to omit the Digital Workfile.

  The recipient of this EDI transmission must also have WinTOTAL on their system to understand the file you send. For more information on EDI, please see our dedicated EDI Center chapter.

- Items from the Digital Workfile must be printed one by one. While on a particular item, just click Print and it will go to your printer.

More Chapters

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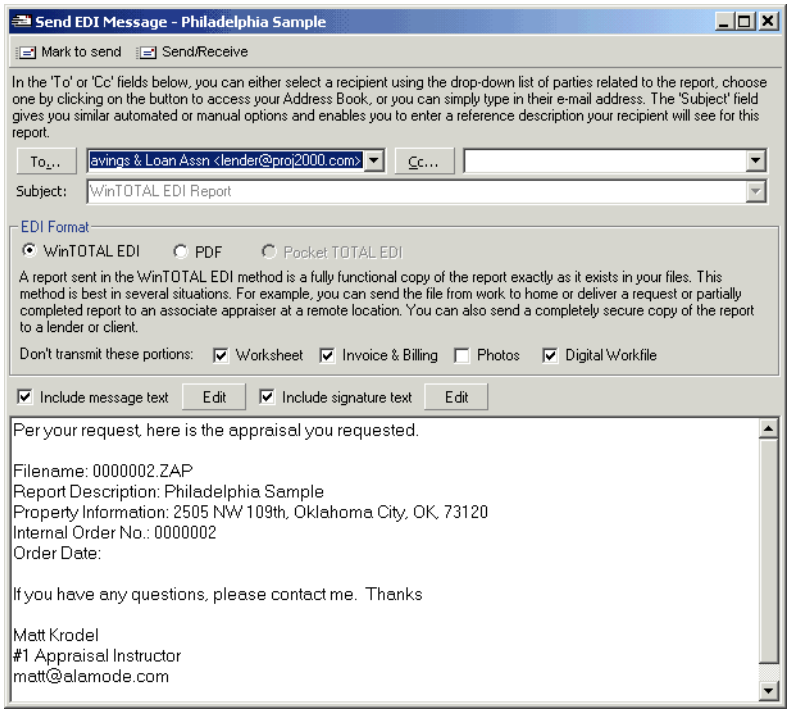

Send EDI Message - Philadelphia Sample
Mark to send
Send/Receive
In the 'To' or 'Cc' fields below, you can either select a recipient using the drop-down list of parties related to the report, choose one by clicking on the button to access your Address Book, or you can simply type in their e-mail address. The 'Subject' field gives you similar automated or manual options and enables you to enter a reference description your recipient will see for this report.
To...
avings & Loan Assn <lender@proj2000.com>
Cc...
Subject:
WinTOTAL EDI Report
EDI Format
WinTOTAL EDI
PDF
Pocket TOTAL EDI
A report sent in the WinTOTAL EDI method is a fully functional copy of the report exactly as it exists in your files. This method is best in several situations. For example, you can send the file from work to home or deliver a request or partially completed report to an associate appraiser at a remote location. You can also send a completely secure copy of the report to a lender or client.
Don't transmit these portions:
Worksheet
Invoice & Billing
Photos
Digital Workfile
Include message text
Edit
Include signature text
Edit
Per your request, here is the appraisal you requested.
Filename: 0000002.ZAP
Report Description: Philadelphia Sample
Property Information: 2505 NW 109th, Oklahoma City, OK, 73120
Internal Order No.: 0000002
Order Date:
If you have any questions, please contact me. Thanks
Matt Krodel
#1 Appraisal Instructor
matt@alamode.com

When sending files electronically, you have the option to not send the digital work-file.

Solution Center

Solution Center - Gateway to Self-help

The Solution Center is truly your one-stop center for finding answers to your questions or seeking assistance when using WinTOTAL. You will want to get comfortable using this area of the WinTOTAL program; it plays a key role in keeping your office productive. The Solution Center is where you will perform a variety of functions on a regular basis, including:

- Getting updates to WinTOTAL
- Accessing and even searching the technical documentation library
- Submitting electronic Support Requests to our staff
- Conveniently accessing eDomina services

To access the Solution Center, open WinTOTAL to the Appraisal Desktop; then, click the **Solution Center** link on the left side of the screen.

Solution Center layout

The Solution Center Home page is the starting point for accessing all of the Solution Center features. All pages within the Solution Center are really divided into two areas.

- The area above the page name has navigation links to other pages within the Solution Center. For example, clicking Support Tools takes you to the Support Tools page.
- The area below the page name displays the features and links associated with the page being viewed.

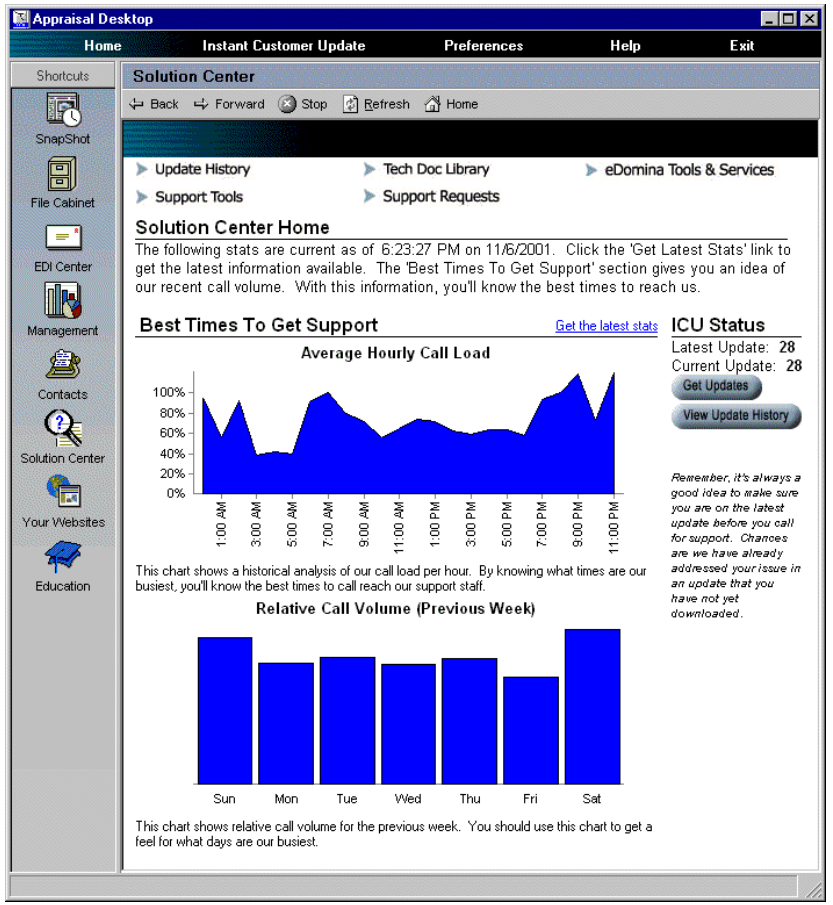
Solution Center Home page

The features area of the Solution Center Home page has two sections, Best Times to Get Support and ICU Status.

Best Times to Get Support

The Best Times to Get Support area displays a la mode call center data in an easy-to-read, graphical, format which you can use to determine the best times to call for technical support. Low points in the graphs point out when our staff is least busy - thus more available.

- **Average Hourly Call Load**. The Average Hourly Call Load section displays a historical analysis of call volume to the a la mode Technical



The Solution Center Home page displays Call Center data in the Best Times to Get Support section, as well as links for navigating to other Solution Center feature areas.

Support department. You'll want to try and reach the Technical Support staff when call volumes are not at their peak.

- **Relative Call Volume (Previous week)**. The Relative Call Volume section displays call volumes by day for the previous week, Sunday through Saturday. Use this section to determine which days are best to reach the a la mode Technical Support staff. It's always better to reach us than to leave a message, so time is not wasted playing "phone tag".

We make every attempt to answer all calls immediately, each and every time. However, there will be instances when you will need to leave a message. When you leave a message, you should always receive a receipt via fax or e-mail - based on information already in our customer database. If you don't receive confirmation within an hour or so (longer for faxes or after hours) it may mean we didn't get your message or our contact information is incorrect, and you should contact us via another method. We will always return messages as soon as possible.

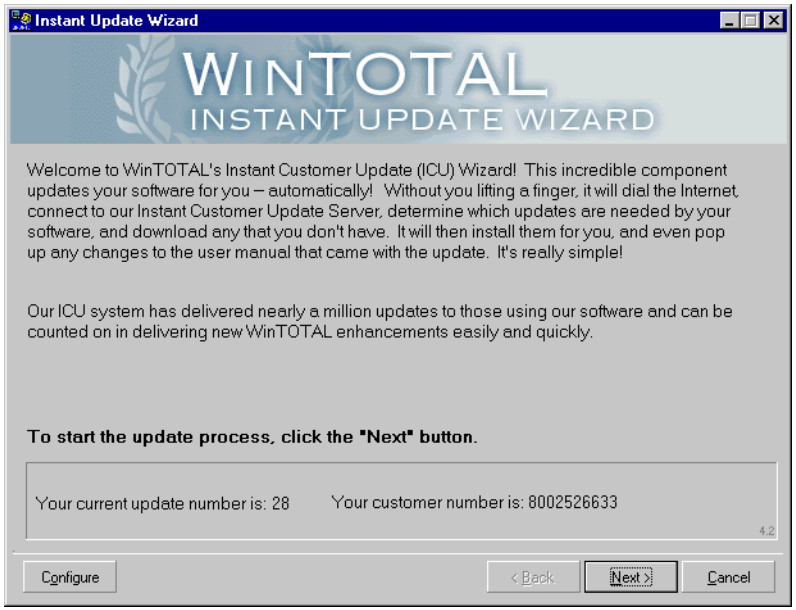
If you have a technical issue, question or suggestion that does not require you to personally speak with a technician, or you simply do not have the time to speak with someone, consider sending a Support Request rather than calling the support line. This also helps to keep the support lines open for those that may require immediate assistance to stay operational.

For more information about sending Electronic Support Requests, refer to the ***"Submit a Support Request"*** section of this chapter.

Getting updates to WinTOTAL

The ICU (Instant Customer Update) system built into WinTOTAL allows our development staff to implement enhancements such as new or changed forms, new features and modules, and fixes to an occasional bug - all without sending disks or posting "patches" on our website. It's all automatic, so even a computer novice can get program updates. To take advantage of the ICU system, you will need to maintain a current Silver, Gold or Platinum membership and have a connection to the Internet.

If you have a support issue, check for updates first. After all, we may have resolved it already. You have nothing to lose as the updates are included as a part of your Silver, Gold or Platinum membership.


Instant Update Wizard
WINTOTAL
INSTANT UPDATE WIZARD
Welcome to WinTOTAL's Instant Customer Update (ICU) Wizard! This incredible component updates your software for you – automatically! Without you lifting a finger, it will dial the Internet, connect to our Instant Customer Update Server, determine which updates are needed by your software, and download any that you don't have. It will then install them for you, and even pop up any changes to the user manual that came with the update. It's really simple!
Our ICU system has delivered nearly a million updates to those using our software and can be counted on in delivering new WinTOTAL enhancements easily and quickly.
To start the update process, click the "Next" button.
Your current update number is: 28
Your customer number is: 8002526633
Configure
< Back
Next >
Cancel

Click Instant Customer Update to get the latest updates to WinTOTAL. They are included with your Silver, Gold or Platinum membership.

The ICU Status area has two options you can select, Get Updates and View Update History:

- **Get Updates.** Click Get Updates to download program updates using our on-screen wizard. The Instant Update Wizard connects to the Internet and a la mode's update servers to download only updates your system lacks. If you need help configuring your Internet connection, refer to ***"Configuring WinTOTAL's Internet Settings"*** in our ***"Sending and Receiving Reports"*** chapter.
- **View Update History.** As you download updates, documentation about the changes is shown on screen. In this View Update History section, you can see that information again if needed.

Support Tools

Click **Support Tools** and the Support Tools page displays three options available for use while in communication with an a la mode Support Technician. These tools allow them to walk you through technical procedures quickly and easily.

Analyze My System

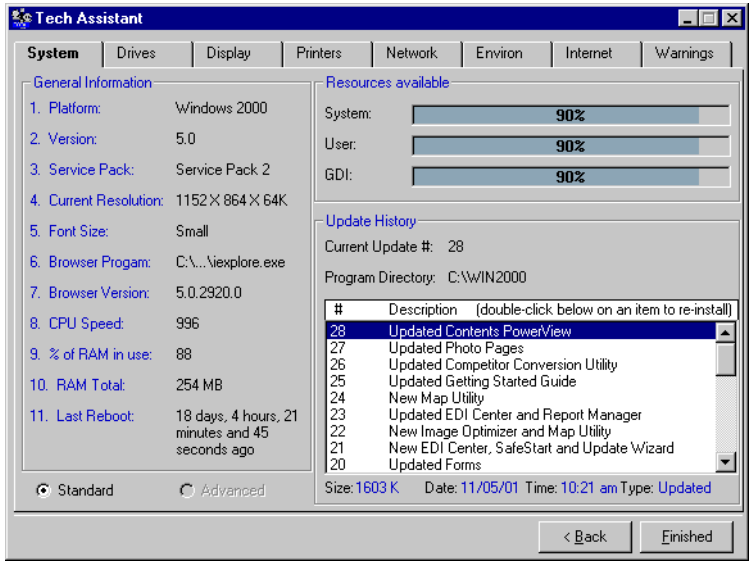
Clicking this option launches the Tech Assistant and performs an analysis of your system. The analysis displays a great deal of information about your system: things like your screen resolution, amount of RAM, printer drivers installed, and much more.

An a la mode Support Technician might ask you to access this tool to obtain various information that can help them assist you as quickly as possible. This analysis also automatically sends as an attachment should you send a Support Request.

Edit System Files

Clicking this option launches the Tech Support Assistant - Edit System Files dialog. From here, WinTOTAL configuration file settings can be viewed and edited when needed.

Note: WinTOTAL configuration settings should ONLY be edited at the direction of an a la mode Support Technician. Incorrect configuration settings can cause your WinTOTAL program to function improperly.



WinTOTAL's Tech Assistant makes easy work of determining your system configuration and performing essential diagnostics.

Solution Center

Run WinTOTAL Utilities

Click **Run WinTOTAL Utilities** and the Launch Utilities dialog displays. From the Launch Utilities dialog you can run general Windows programs or utilities, and repair and maintenance utilities specific to WinTOTAL. To launch any of the utilities, just double-click the listing.

Two very useful Windows utilities you can access from here are ScanDisk and Disk Defragmenter. It is recommended that you run ScanDisk weekly and Disk Defragmenter monthly, to help keep your system operating at optimal levels.

Some of the tasks you can use the WinTOTAL-specific utilities to accomplish include:

- Backing up and restoring system databases
- Copying updates from one computer to another
- Repairing databases, if necessary
- Reinstall system files

Tech Doc Library

Click **Tech Doc Library** to display a “Search Tech Library” screen where, you can access technical documents designed to answer questions you may have, or assist you in resolving problems you may experience. You can even search for the documents you need by using keywords.

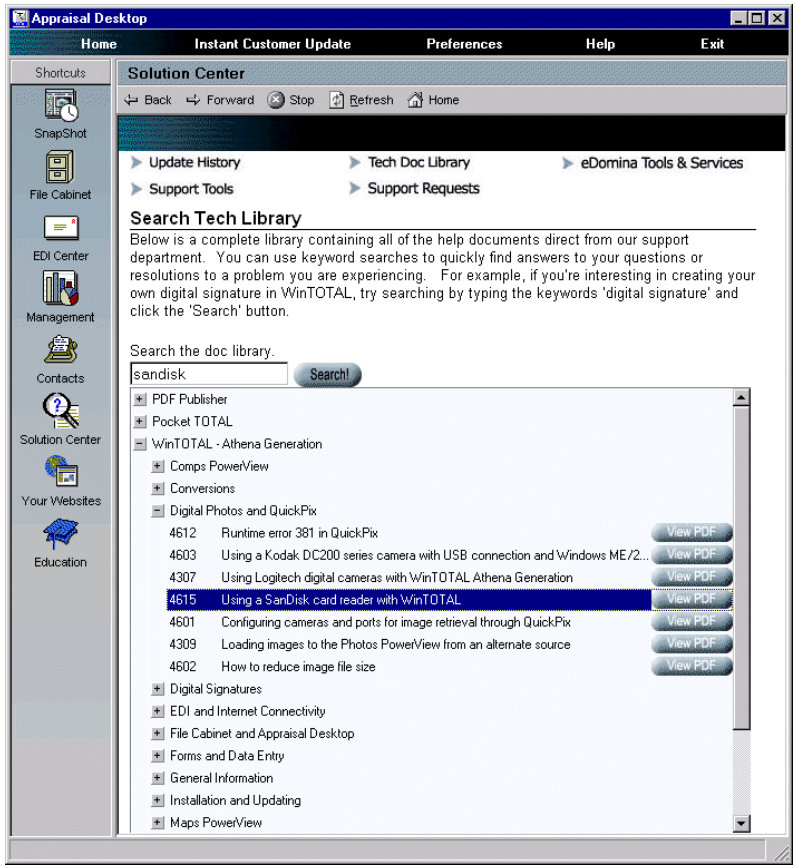
You’ll find documents here addressing very specific subjects such as setting up your digital signature, configuring EDI on a new PC, or how to fax a report from WinTOTAL. There are also documents that address malfunctions such as what to do if your printer prints multiple copies that you didn’t request, what causes the basement square footage to blank out in a report, or how to reduce image file size.

These technical documents should not be used in place of this manual but rather, in addition to the manual. Most questions that you’ll ever have can be answered by referring back to your manual.

Searching for documents

To search for support documents, do the following:

1. Enter a keyword or phrase in the **Search the doc library** entry field. For example: **signature**


Appraisal Desktop
Home
Instant Customer Update
Preferences
Help
Exit
Shortcuts
SnapShot
File Cabinet
EDI Center
Management
Contacts
Solution Center
Your Websites
Education
Solution Center
Back
Forward
Stop
Refresh
Home
Update History
Tech Doc Library
eDomina Tools & Services
Support Tools
Support Requests
Search Tech Library
Below is a complete library containing all of the help documents direct from our support department. You can use keyword searches to quickly find answers to your questions or resolutions to a problem you are experiencing. For example, if you're interesting in creating your own digital signature in WinTOTAL, try searching by typing the keywords 'digital signature' and click the 'Search' button.
Search the doc library.
sandisk
Search!
PDF Publisher
Pocket TOTAL
WinTOTAL - Athena Generation
Comps PowerView
Conversions
Digital Photos and QuickPix
4612 Runtime error 381 in QuickPix
4603 Using a Kodak DC200 series camera with USB connection and Windows ME/2...
4307 Using Logitech digital cameras with WinTOTAL Athena Generation
4615 Using a SanDisk card reader with WinTOTAL
4601 Configuring cameras and ports for image retrieval through QuickPix
4309 Loading images to the Photos PowerView from an alternate source
4602 How to reduce image file size
View PDF
Digital Signatures
EDI and Internet Connectivity
File Cabinet and Appraisal Desktop
Forms and Data Entry
General Information
Installation and Updating
Maps PowerView

The Tech Library contains Technical Support Bulletins that can provide the answers to how-to questions as well as diagnostics and resolutions to technical issues.

2. Click **Search**. A listing of documents containing the keyword you entered displays.
3. To view the document, click **View PDF**. WinTOTAL will connect to our web site at **www.alamode.com** to download and then subsequently display the most current version of the document selected.

Browsing for documents

You can also browse through our list of tech docs. For example, to see all documents pertaining to WinTOTAL EDI, do the following:

1. Click the plus **[+]** symbol to select **WinTOTAL - Athena Generation**. You'll see the list expand to show all the categories.
2. The most relevant category would appear to be **EDI and Internet Connectivity**. Click the plus **[+]** symbol to select it. A list of current documents about EDI and Internet connectivity issues displays.
3. The document titled, "How to Send a Report EDI" sounds as though it may contain the information you need. Click **View PDF**. WinTOTAL will connect to our web site at **www.alamode.com** to download and then subsequently display the most current version of the document selected.

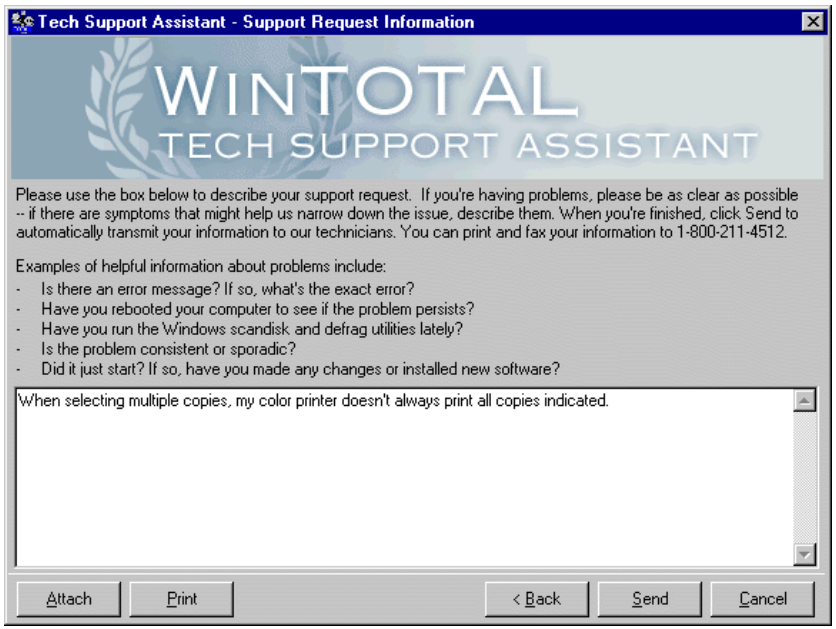
Support Requests

Clicking **Support Requests** displays the Support Request page. The Support Request page has two headings, Submit a Support Request and Support Request History.

Submit a Support Request

This is a great way to get technical support - especially if you have an issue that doesn't require you to speak with a technician at that very moment. Support Requests sent to our staff in this manner are automatically entered into our call queue and receive more callback attempts than voice messages, e-mails or faxes. If we don't get a hold of you on the day you send the support request, we will make attempts over the course of several days to get your issue resolved. To submit a Support Request, do the following:

1. In the Support Requests section of the Appraisal Desktop's Solution Center, click **Submit Support Request**. The Tech Support Assistant - Support Request Information dialog displays.


Tech Support Assistant - Support Request Information
WINTOTAL
TECH SUPPORT ASSISTANT
Please use the box below to describe your support request. If you're having problems, please be as clear as possible -- if there are symptoms that might help us narrow down the issue, describe them. When you're finished, click Send to automatically transmit your information to our technicians. You can print and fax your information to 1-800-211-4512.
Examples of helpful information about problems include:
- Is there an error message? If so, what's the exact error?
- Have you rebooted your computer to see if the problem persists?
- Have you run the Windows scandisk and defrag utilities lately?
- Is the problem consistent or sporadic?
- Did it just start? If so, have you made any changes or installed new software?
When selecting multiple copies, my color printer doesn't always print all copies indicated.
Attach
Print
< Back
Send
Cancel

From the Support Request section of the Solution Center you can submit Support Requests in order to get assistance from the a la mode Technical Support staff, and view the history and details of requests submitted previously.

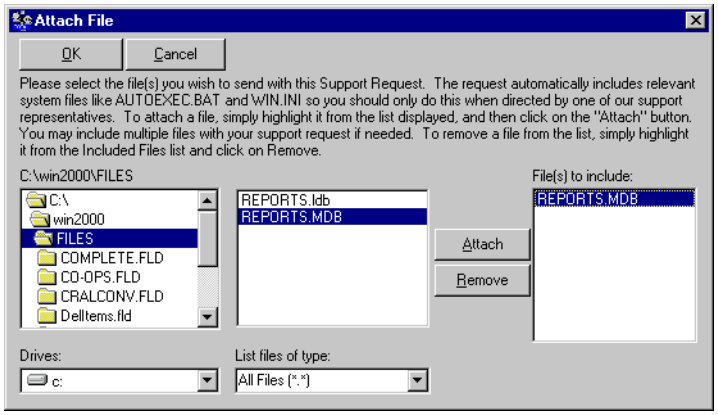
2. Under the Support Request Priority heading, select the appropriate priority-level for your circumstances.
3. Under the Your Contact Information heading, enter as much information as applicable.
4. Click **Next**.
5. Enter as much detail as possible regarding your issue in the notes field. *If you have a specific error message, error number, or know the steps to recreate your problem, let us know.*
6. If you need to attach a specific file, such as a report or database, to your Support Request, click **Attach**. The Attach File dialog displays. If you are not attaching a file, skip to step 7.

   In the left-hand window, double-click the folder within WinTOTAL containing the file to attach. In the center window, click to highlight the appropriate file. Click **Attach**, and the file displays in the right-hand window. Then, click **OK**. You will see "Attachments" noted in blue text above the entry window you completed in step 5.
7. Click **Send**. A Send Report Request window displays letting you know that we are going to generate a report that will contain diagnostic information about your system to assist our staff.
8. Click **OK**. You'll see the system report generate and WinTOTAL connect to the Internet to post your support request into our system.

After your support request is received, we will send a fax or e-mail, based on information in your customer records, letting you know we received your support request. If you do not receive confirmation within an hour, contact us via a different means to make sure we have correct information for you and clear up any communication breakdowns. We respond to all support requests.

Support Request History

Use the Support Request History to display a listing of Support Requests you have submitted, from oldest to newest. You can also view any response sent via email by the a la mode Technical Support staff. This comes in handy should you have the same question or issue at a latter time; you can see the answer or resolution that was provided. Use the scroll bar on the right-hand side of the screen to see more listings, if necessary.


Attach File
OK
Cancel
Please select the file(s) you wish to send with this Support Request. The request automatically includes relevant system files like AUTOEXEC.BAT and WIN.INI so you should only do this when directed by one of our support representatives. To attach a file, simply highlight it from the list displayed, and then click on the "Attach" button. You may include multiple files with your support request if needed. To remove a file from the list, simply highlight it from the Included Files list and click on Remove.
C:\win2000\FILES
C:\
win2000
FILES
COMPLETE.FLD
CO-OPS.FLD
CRALCONV.FLD
DellItems.fld
REPORTS.ldb
REPORTS.MDB
Attach
Remove
File(s) to include:
REPORTS.MDB
Drives:
c:
List files of type:
All Files (*.*)

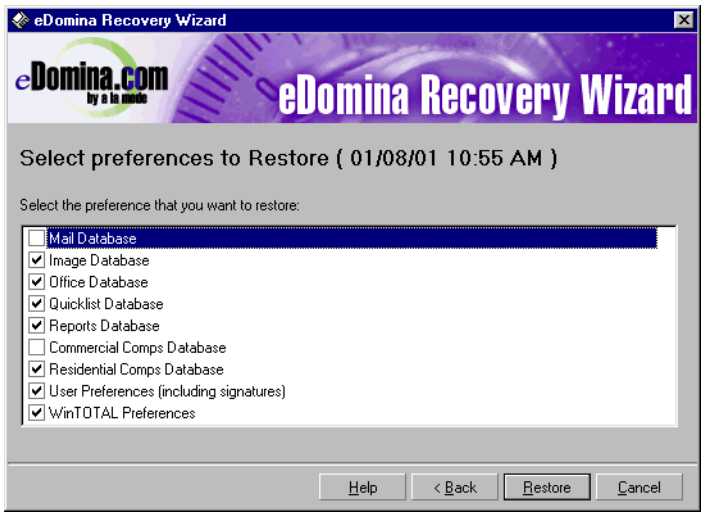
At the request of our technical staff, you may need to send us one or more files for analysis in order to solve your support issue.

Solution Center

eDomina Tools & Services

If you are an eDomina member, you can use the eDomina Tools & Services page to conveniently access various eDomina services. For these functions to work, you will need to have pre-purchased these tools via the eDomina.com website or by calling us at 1-800-ALAMODE. If you are not currently an eDomina member, you can access the eDomina.com web site from here to learn about membership benefits and sign-up.

- **eDomina Exact** can automatically duplicate and save to eDomina's secure servers the files that make your appraisal software unique to how you work. With Exact you have access to every database and setting you'll need to be up and working quickly from a computer at home, a laptop in the field or even when setting up a new PC. You won't waste hours "re-personalizing" your system.
- The **eDomina Vault** is the only online storage service specifically designed for appraisers, and it works with all appraisal software. Your files are located in your private storage area to which only you have access. The Vault's uploading program automatically checks for and sends updated and new files, based on your preferences, to our secure server, as often as you schedule. Use the Vault to backup and store your files or retrieve them as needed when you're away from the office, 24 hours a day, everyday.
- **eDomina SureReceipts**. Use SureReceipts as an alternative to sending appraisal reports via regular E-mail. No more phone calls to find out when or if a client received the appraisal report you sent. It is the best way to be sure a report was delivered.



The eDomina Exact product is designed to keep safe copies of databases and WinTOTAL configuration files. These copies can be used in the event your system crashes or in situations where you want to set up a new system with WinTOTAL

More Chapters

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's PowerViews. The more you know about the software, the more efficient and competitive you can be.

Migration Wizard

Athena Migration Wizard

Why we have this Migration Wizard

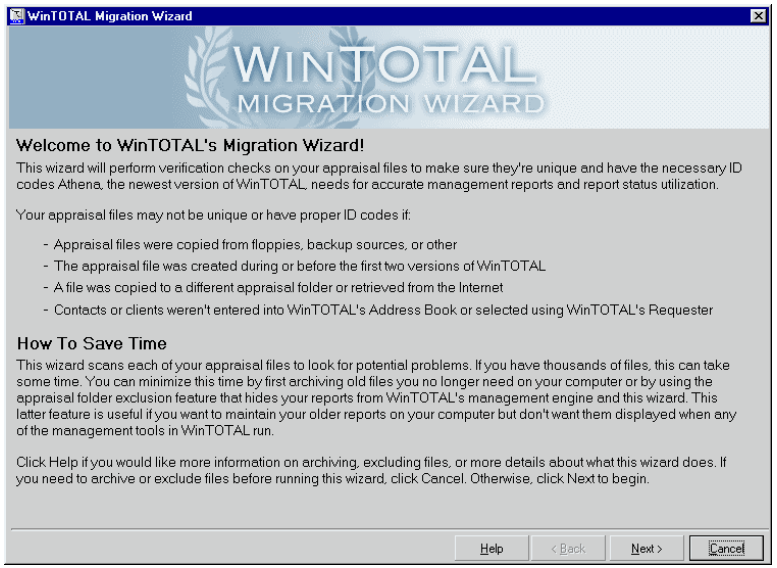
The Olympus generation of WinTOTAL introduced advanced billing and office management features. In order to make it work with your existing (Version 2 - Apollo or converted DOS) data and reports with as little disruption to your daily workflow as possible, we decided to allow for certain things in the Olympus Office Management module:

- **Management Reports were based on the contact (i.e. Appraiser, Lender, Client, etc.) name versus a contact ID-Code.** This was because prior versions didn't use the ID Code. However, as a result, if you were to have multiple entries with the same name - branch offices or multiple contacts at one location - this would cause duplicates in the Management Reports.
- **WinTOTAL didn't explicitly require that contacts be in databases.** We didn't want the program to "get in the way". Therefore, you could type them right into the form without any warning that things like management reports and billing weren't going work without first having these entries in the Address Book.
- **Duplicate and blank ID Codes were not restricted.** Originally, these were for your own usage and didn't have as much importance as they do now. Therefore, if we were to run reports based on them, there was still a potential for unexpected results.
- **WinTOTAL allowed duplicates of reports.** There was no safeguarding against duplicate reports in Office Manager. If you had 3 or 4 copies of a report within WinTOTAL, due to copying in from disk or other actions, you could experience problems related to status, billing or running the Management reports.

This lack of strictness regarding your data entry could result in numerous problems with billing, status messaging and the Management Reports.

What this module does to correct problems

So, in preparing for Athena it's important that all of your current data is structured and meets standards to match Athena's new billing and management. Instead of requiring you to go and "fix" all of your reports manually by opening them and assigning entries and checking for duplicates, we have created this Migration Wizard. It has two main parts:


WinTOTAL Migration Wizard
WINTOTAL
MIGRATION WIZARD
Welcome to WinTOTAL's Migration Wizard!
This wizard will perform verification checks on your appraisal files to make sure they're unique and have the necessary ID codes Athena, the newest version of WinTOTAL, needs for accurate management reports and report status utilization.
Your appraisal files may not be unique or have proper ID codes if:
- Appraisal files were copied from floppies, backup sources, or other
- The appraisal file was created during or before the first two versions of WinTOTAL
- A file was copied to a different appraisal folder or retrieved from the Internet
- Contacts or clients weren't entered into WinTOTAL's Address Book or selected using WinTOTAL's Requester
How To Save Time
This wizard scans each of your appraisal files to look for potential problems. If you have thousands of files, this can take some time. You can minimize this time by first archiving old files you no longer need on your computer or by using the appraisal folder exclusion feature that hides your reports from WinTOTAL's management engine and this wizard. This latter feature is useful if you want to maintain your older reports on your computer but don't want them displayed when any of the management tools in WinTOTAL run.
Click Help if you would like more information on archiving, excluding files, or more details about what this wizard does. If you need to archive or exclude files before running this wizard, click Cancel. Otherwise, click Next to begin.
Help
< Back
Next >
Cancel

The WinTOTAL Migration Wizard corrects inconsistent and unstructured entries in your Address Book for more reliable management reports and billing.

- Reconciling multiple copies of reports
- Assigning contacts from the database to any files that do not use them.

The Migration Wizard also creates a unique ID for any contacts that do not currently have one; however, this happens behind the scenes and doesn't require any interaction from you.

Before running the Migration Wizard

How much time will the Migration Wizard take?

Depending on your individual habits, the operations of the Migration Wizard could run very quickly. Or, they may take a long time.

- If you use the Requester and Address book as we've always recommended, then the Migration Wizard may not take much time at all - depending on how many duplicate files you have.
- If you always type your appraiser names, lenders and clients into the forms directly and bypass the drop-downs in the Requester, then this may take a long time as you assign contacts into your reports. Don't worry, if you don't finish, you can always start it again to pick up where you left off.

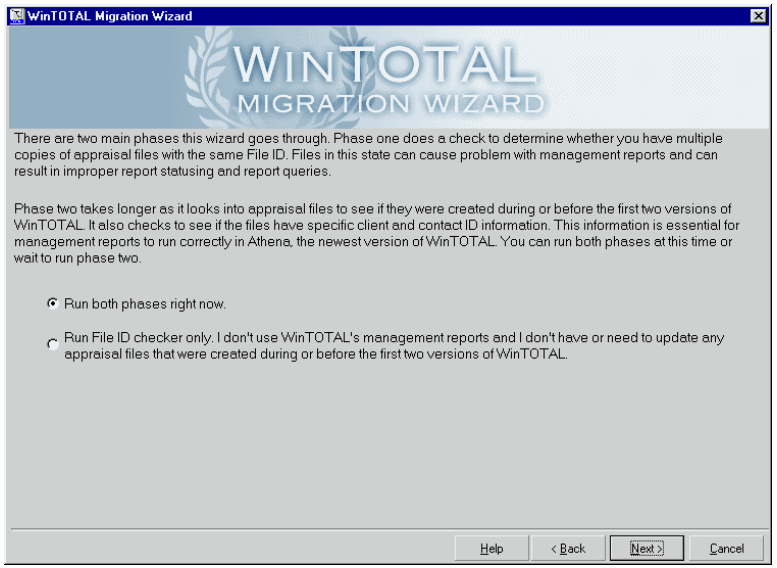
Save time by excluding files from the Migration Wizard

As you process files in the Migration Wizard, you are given an option to move them to an excluded folder in your File Cabinet - which is created by the Migration Wizard. This is a real easy option; however, it does put all your excluded files in one place as well as stop you on a one by one basis.

Just as you've always been able to exclude files from WinTOTAL's management reports, files can also be excluded from the Migration Wizard process on a folder by folder basis. Before running the Migration Wizard, you may wish to tag some folders to skip. This could save you time from having the Migration Wizard prompt you for things in dedicated template files or files from several years ago in which you have no interest in seeing in a management report or statement.

To exclude, or "hide" from the Migration Wizard all reports in a folder:

1. First, go to WinTOTAL's Office Manager or Athena's File Cabinet.)


WinTOTAL Migration Wizard
WINTOTAL
MIGRATION WIZARD
There are two main phases this wizard goes through. Phase one does a check to determine whether you have multiple copies of appraisal files with the same File ID. Files in this state can cause problem with management reports and can result in improper report statusing and report queries.
Phase two takes longer as it looks into appraisal files to see if they were created during or before the first two versions of WinTOTAL. It also checks to see if the files have specific client and contact ID information. This information is essential for management reports to run correctly in Athena, the newest version of WinTOTAL. You can run both phases at this time or wait to run phase two.
Run both phases right now.
Run File ID checker only. I don't use WinTOTAL's management reports and I don't have or need to update any appraisal files that were created during or before the first two versions of WinTOTAL.
Help
< Back
Next >
Cancel

You can choose to run both or just one part of the Migration Wizard. If you don't have time to finish, you can always start it again later by clicking the Office Manager (or File Cabinet) Options menu and choosing Migration Wizard.

2. Click the folder you wish to exclude. For example, it could be a folder that has old reports that you'll never need to run statements on. Or, it could be the folder in which you store your templates.
3. Once the folder is highlighted, click the Folder menu and choose Exclude from Management Reports.

Note: Exclusion is done on entire folders and cannot be applied to single reports one at a time.

Repeat steps 2 and 3 for any other folder you wish to exclude. Remember, this will exclude all files contained within that folder from being shown in billing statements as well as the Migration Wizard. You may wish to create special folders and use our file moving functions to organize your files to make this migration easier. For more information, reference the chapter on ***"Managing Your Files"***.

To exclude or "hide" a folder from Management Reports or the Migration Wizard, simply right-click it and choose "Excluded from Management Reports". A red mark will appear on the folder.

Starting the utility

The Migration Wizard is set to pop up automatically at certain times. However, if you don't have time to finish the operations, you can click Finish and start again later. **The Migration Wizard may be launched at anytime by clicking the File Cabinet's Options menu and choosing Migration Wizard.**

Phase One: Check for duplicate file ID's

How duplicate ID's occur

As mentioned before, WinTOTAL assigns an internal ID to each report. However, if a file was copied in any manner, often through typical usage, the ID wouldn't be reset and you would have two files with the same internal ID. This can cause problems with billing, status and reporting if not corrected. This module helps you correct the problem without manually opening each report.

Reconciling multiple reports with the same ID

This phase stops at the first group of files that share the same ID.

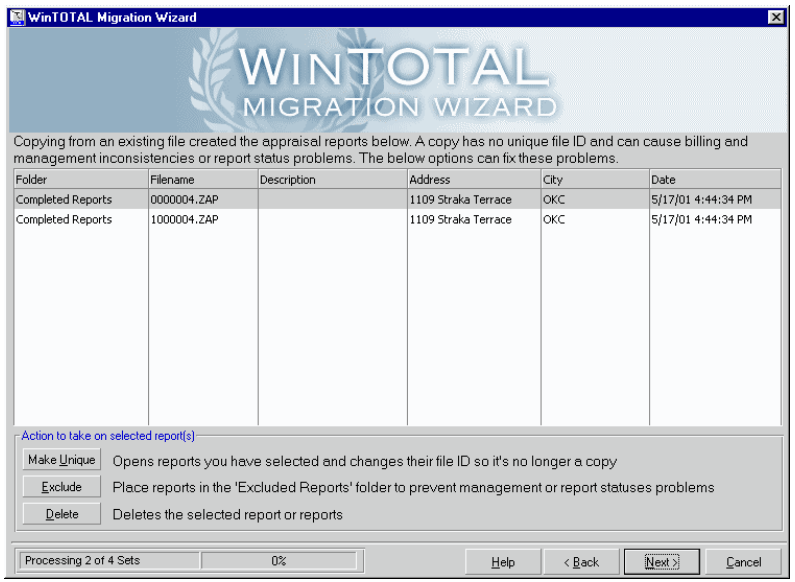
- The columns may be sorted by clicking the column's title. The first time you click the column title, the reports will sort ascending; the second time, descending.

- Click once on files to select them. Once a file is selected, CTRL+CLICK on a different file and both of them will be highlighted. Or, you can SHIFT+CLICK to select a block of files. This is the same functionality as you would see in Windows Explorer.
- Note that the number of "sets" of files you must go through is reported at the bottom of your screen.

You must to do something with all but one of the files listed. Select one or more files, then choose an option:

- **Make Unique.** This simply puts a different ID code in the file(s). Use this in cases where the files really should be tracked differently.
- **Exclude.** This puts the selected file(s) into a folder called Excluded Reports.
- **Delete.** Naturally, this option removes the highlighted report(s) and all data permanently from your system.

Once you have processed a set of files, the Migration Wizard will move on to the next set until all duplicate files have been cleared up.



WinTOTAL assigns an internal ID to all your reports. This is useful for billing functions as well as status. When files are duplicated and have the same ID, unexpected results will occur with certain functions. The Migration Wizard fixes this problem.

Phase Two: Update files with Contacts

The recommend way to enter lenders, appraisers, etc.

When you initially start a report (either new or cloned), you are first prompted to enter information into the Requester including any Trading partners (client, lender, bill to, and ship to) and any employees (appraiser and supervisor).

When you use the Address Book, instead of typing them directly, you can choose these entries from a drop-down list. Not only does this eliminate repetitive typing, it facilitates our billing and tracking systems. The purpose of this module is to let you insert entries from our Address Book into existing reports where the trading partners were not necessarily chosen from the Requester's drop down list.

Additional information on the Address Book is given at the end of this chapter.

Migration Wizard

Replacing report entries with contacts from the database

For each report that doesn't have structured entries for the appraiser, lender, client, etc., it will stop and give you an opportunity to pick people from your Address Book.

- The left panel lists all contacts for the current report that don't have an associated entry in the database. Note: There are a total of 7 possible entries within each report that may not have an associated database entry. If you have separate names for client, bill to, ship to, etc. you may see the entries for one report multiple times.

  Below the list is additional information to assist you in determining which report is show. The Report Info button is available to load the request data for that report in case you need more information.

- The right panel lists contacts available for that entry, filtered depending on the type of entry highlighted in the left panel If you're looking at an entry on the left for a Lender contact, then on the right you will only have lender/client entries. If you're looking at an entry for appraiser, you will only have the appraiser contacts listed on the right.

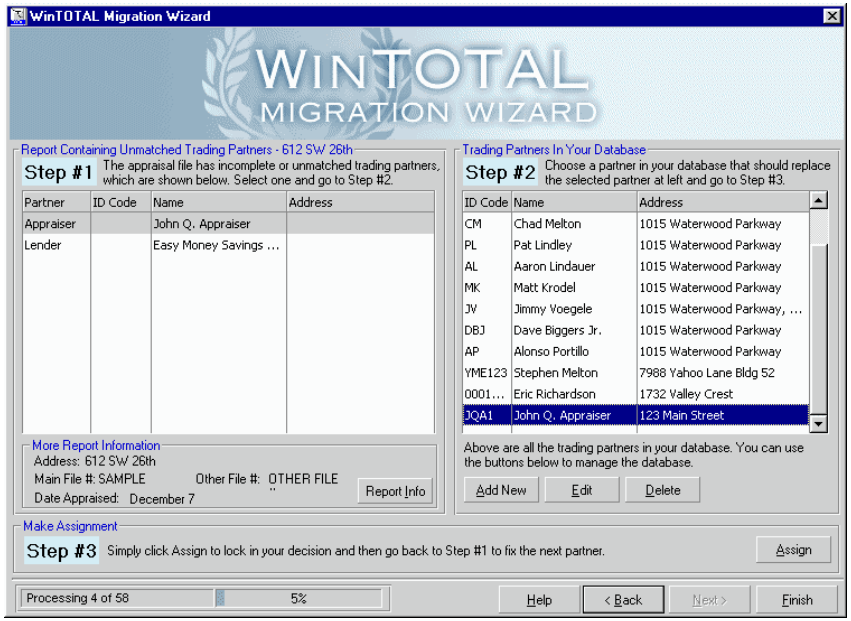
To replace an existing, unstructured, entry in a report with an item from your Address Book, do the following:

1. Click the item displayed in the left panel.
2. Click the desired item from your Address Book on the right. (Remember, you may need to add entries into your Address Book if they don't exist for the entries in your reports.)
3. Click the Assign button. The entry in your appraisal file will be replaced with the contact you chose, and that item will be cleared from the list on the left.
4. Repeat steps 1 through 3 until all entries on the left are cleared.

The Migration Wizard will cycle through all files that need the entries repaired until none are left - at that point you are done. Or, you can click Finish and pick up where you left off at a later time by launching the Migration Wizard again from the File Cabinet's Options menu.

Address Book basics

From within the Migration Wizard you can open your Address Book to add, delete and edit its entries. (It's under Step #2.) If you haven't been

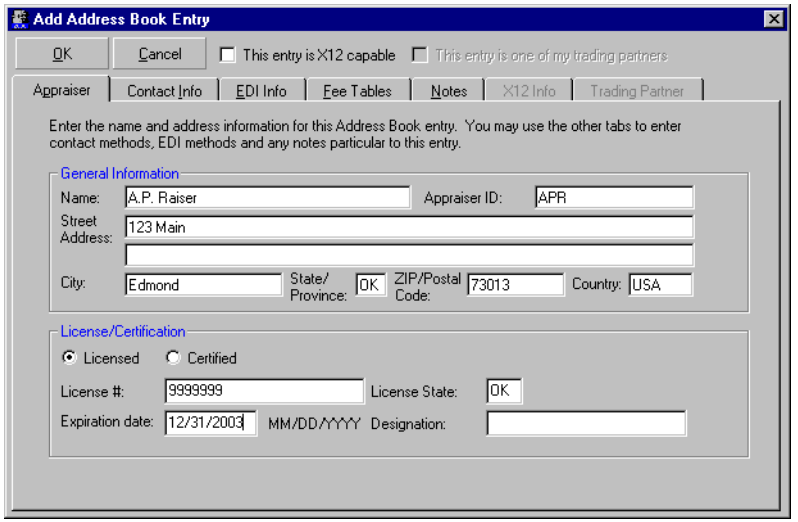


For files that had appraiser, lender, client and other entries typed manually, the Migration Wizard enables you to easily go through them and assign contacts in a structured format.

using the Address Book, then you'll need to add a lot of contacts at this time. Just click Add, and type in the fields. Click OK when you are through with an entry. *Fill in as much information as you can on all tabs. Blank fields in your Address Book are the most common cause for information disappearing from forms and invoices.*

A common question regards the ID Code. The ID Code is simply an internal identifier that helps you organize your entries. The most common use for the ID Code is when you have two entries with the same name (i.e. a Lender with two offices) and you need to be able to distinguish them. You can use any naming scheme you want; for example, you may wish to use the initials of the appraisers in your office.

If you have existing entries in your Address Book, you may wish to view them and make sure information is complete and accurate by clicking the Edit button. For each appraiser listed in your Address Book, click Edit and make sure that license and certification information is entered as well.



When adding new contacts, be sure to put in as much information as possible. A common mistake is to leave off lic/cert information - resulting in entries being cleared on forms when they are loaded.

That's It! Here are more guides.

Click here to go to the online Table of Contents where you can access additional chapters in the WinTOTAL user guide. Or, view the other parts of the manual by selecting Contents from WinTOTAL's Help menu. You will find more tutorials on all of WinTOTAL's functions. The more you know about the software, the more efficient and competitive you can be.